TABLE of CONTENTS

APPENDICES

APPENDIX A: 2017 Body of Knowledge

HOW TO USE THIS HANDBOOK
CERTIFICATION ADMINISTRATIVE BOARD
WHY EARN THE CAP CREDENTIAL?
EARNING YOUR CAP
ELIGIBILITY REQUIREMENTS AND EXAM APPLICATION
SUBMITTING YOUR APPLICATION
2018 EXAM DATES AND DEADLINES
2018 CAP EXAM FEES
CAP APPLICATION PROCESS
CAP APPLICATION AUDIT
CAP APPLICATION REVIEW PROCESS
CAP EXAM SCHEDULING
CONFIDENTIALITY
VERIFICATION OF CERTIFICATION
ACCOMMODATIONS
DIVERSITY
EXAM OVERVIEW
CAP EXAM DOMAINS
TEST FORMAT
Core Resource List
Exam Scoring
EXAM ADMINISTRATION
Retesting
Testing Issues
Cancellation of Test Under Extraordinary Circumstances
Delay of Exam Date
Delay of Exam Date Due to Emergency
Failure to Take the Exam
PREPARING FOR THE CAP EXAM
USE OF THE CAP DESIGNATION
MAINTAINING CAP CREDENTIAL THROUGH RECERTIFICATION
QUALIFYING ACTIVITY CATEGORIES
CAP Recertification Qualifying Activity Examples
Calculating Professional Development Activities
Industry-specific Professional Development
RECERTIFICATION OVERVIEW
RECERTIFYING EARLY
Recertification Fees
Due Process and Appeals
RETIRED STATUS
Retired Status Fees
WELCOME

Professional certification is a distinction that sets you apart from others. It’s an investment in your career that shows employers, coworkers, and the public that you are committed to your profession and you excel in your field. Certification makes you more valuable to employers and gives you a competitive advantage in the workforce.

The International Association of Administrative Professionals (IAAP) established the first certification program in 1951 to promote the highest standards for administrative support personnel through credentialing of administrative and office support professionals, referred to at the time as secretaries. The initial credential was the Certified Professional Secretary (CPS), which was changed in 2012 to the Certified Administrative Professional (CAP).

By reviewing this Certification Handbook, you have taken the first step in joining the thousands of administrative professionals throughout the world who have earned the CAP designation.

HOW TO USE THIS HANDBOOK

THIS HANDBOOK SUMMARIZES KEY ASPECTS OF THE CAP PROGRAM, IT CAN BE USED TO:

- Decide if CAP is right for you and if you meet the eligibility requirements.
- Complete the application process.
- Develop your course of study to prepare to sit for the CAP exam.
- Maintain your CAP credential through the recertification program.

The CAP is a dynamic program that continues to evolve and be refined as the workplace changes. No printed document can address every potential question, policy detail, or future program change. You are encouraged to use this Candidate Handbook as a supplement to the program information provided on the CAP Program Web pages as well as the information provided by the IAAP credentialing staff, who can be contacted at certification@iaap-hq.org or 816-891-6600.

CERTIFICATION ADMINISTRATION BOARD

The Certification Administration Professional Program (CAP Program) operates as an independent certifying body of the International Association of Administrative Professionals (IAAP). The activities of the CAP Program are governed by the Certification Administration Board (CAB). The CAB awards the Certified Administrative Professional (CAP) credential and is responsible for setting policy and standards related to the CAP Program. More information including a listing of current CAB members is available on the IAAP website, www.iaap-hq.org/page/certification.
WHY EARN THE CAP CREDENTIAL?

Earning your CAP demonstrates your aptitude as an administrative and office support professional. It reflects your achievement and commitment to excellence through life-long learning. It’s an investment in your career showing employers, coworkers, customers, and clients your commitment to the profession.

EARNING AND MAINTAINING YOUR CERTIFIED ADMINISTRATIVE PROFESSIONAL (CAP) DEMONSTRATES YOUR PROFESSIONAL KNOWLEDGE AND MASTERY OF VITAL COMPETENCIES:

• Indicates your dedication to your profession and initiative to stay current in an ever-changing marketplace through continuing education required for recertification.
• Shows your employer you are a valuable member of the team committed to professional development.
• Builds invaluable personal and professional confidence.
• Provides new career opportunities and a competitive advantage over applicants without certifications.
• Allows for the potential to earn a bonus, higher salary &/or receive a promotion.
• Earn college credit through Credit for Prior Learning (CPL) programs.
• Is a source of pride for family and friends for your achievement and a great way to speak about your dedication to your career in casual conversations at social events.

Certifications are a cost-effective way to prove your expertise is relevant and up to date. You’re passing the industry’s measurement of knowledge based on skill assessment and industry competency.

An assessment-based professional certification is earned by meeting several requirements, differentiating it from other training or educational programs.

THE FOUR MAIN COMPONENTS OF A CERTIFICATION ARE:

1. A required level of experience and education.
2. Passing a rigorous exam.
3. Exam is not associated with a particular program or course offered by the certifying body.
4. Continued professional development through specific recertification requirements.

EARNING YOUR CAP

Earning and maintaining your Certified Administrative Professional (CAP) is a three-step process. First, candidates must meet the eligibility requirements and submit an application. Once approved, candidates must sit for and pass the CAP exam. After the credential is earned, designees must maintain it by fulfilling recertification requirements every three years.
ELIGIBILITY REQUIREMENTS AND EXAM APPLICATION

CANDIDATES MUST MEET SPECIFIC EDUCATION AND ADMINISTRATIVE OFFICE SUPPORT PROFESSIONAL EXPERIENCE, WHICH ARE:

- **No College Degree** - 4 years of relevant work experience is required.
- ** Associates Degree** - 3 years of relevant work experience is required.
- ** Bachelors Degree** - 2 years of relevant work experience is required.

All relevant work experience must have been earned within the last ten years and include twelve consecutive months with the same employer in the past five years. The college degree must be from a regionally accredited institution.

WHAT IS RELEVANT WORK EXPERIENCE? CAP CERTIFICATION IS DESIGNED FOR OFFICE AND ADMINISTRATIVE PROFESSIONALS WHO ENGAGE IN SOME, IF NOT ALL, OF THE FOLLOWING:

- Communicate within the organization (both verbal and written).
- Conduct business writing, including proofreading and editing.
- Maintain office functions and record keeping.
- Plan meetings, events, and arrange travel.
- Manage projects.
- Engage in or support human relations activities, such as hiring and compliance issues.
- Maintain budgets and basic accounting functions.
- Manage time and other resources for themselves and others.
- Utilize technology, including virtual and mobile, with strong computer and internet research skills.
- Coordinate communications between internal staff and/or external clients.

IF YOU MEET THE EDUCATION AND PROFESSIONAL EXPERIENCE DESCRIBED ABOVE, YOU ARE READY TO COMPLETE YOUR CAP APPLICATION.

SUBMITTING YOUR APPLICATION

You must complete the current Certified Administrative Professional application to apply for the CAP exam. There is an online application or a PDF application process with more details on the required submittals in a subsequent section, CAP Application Process. Please be sure to read all the information included in this Handbook and follow all instructions on the application carefully.

All applications must be received at IAAP by the deadlines listed below. If using first class postal mail, please allow at least ten (10) days. When your application has been reviewed and accepted, you will receive an acknowledgment via email and your name will be entered on the roster of eligible candidates.
2018 EXAM DATES AND DEADLINES

<table>
<thead>
<tr>
<th>Dates</th>
<th>Exam Application (received by)</th>
<th>Late Application (received by)</th>
<th>Exam Scheduling Begins</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 5-21, 2018</td>
<td>March 2, 2018</td>
<td>March 16, 2018</td>
<td>January 22, 2018</td>
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<tr>
<td>Sept. 27-Oct. 13, 2018</td>
<td>August 24, 2018</td>
<td>September 7, 2018</td>
<td>July 9, 2018</td>
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</tbody>
</table>

Please contact IAAP at certification@iaap-hq.org if your online or emailed PDF application has not been acknowledged within two business days or your mailed application has not been acknowledged within ten business days.

Successful applicants may take the exam once at either of the two next test dates as part of their application fee. The exam is offered twice a year, every Spring and Fall. The exams are administered within a testing period of 14-15 days.

Membership with IAAP is not required for CAP certification or recertification; however members do receive discounts on the exam and exam materials.

2018 CAP EXAM FEES

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<th>IAAP member $375</th>
<th>Nonmember $560</th>
<th>Late fee $50</th>
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</table>

Fees are nonrefundable once the application has been processed. An applicant who does not qualify for the exam or whose application is denied, will receive a full refund less a $50 USD processing fee (see Application Review Process).

CAP APPLICATION PROCESS

IF YOU ARE A NEW CANDIDATE APPLYING FOR THE CAP EXAM YOU WILL NEED TO SUBMIT THE FOLLOWING:

- Completed Exam Application Form online or with the downloadable PDF.
- Completed Qualifying Administrative Experience Form (included in the application) or upload a current resume.
- Copy of a college degree or a transcript if submitting less than four years’ experience.
- Exam fee.
- Attestation to uphold the IAAP’s Code of Conduct which is a required attestation for all IAAP members and is now a required attestation for all persons earning the CAP credential regardless of IAAP membership status.

THE IAAP CODE OF CONDUCT IS POSTED ON THE IAAP WEBSITE.

www.iaap-hq.org/?page=CodeConduct

If you are a retake candidate, you will need to submit only the following (if previous attempt was within three years):

- Completed Exam Application Form.
- Exam fee.
CAP APPLICATION AUDIT

TO ENSURE INTEGRITY OF THE EXAMS AND HOW THEY ARE MAINTAINED, IAAP REGULARLY CONDUCTS RANDOM AUDITS OF EXAM APPLICATIONS TO VERIFY THE ACCURACY OF THE INFORMATION SUBMITTED.

CAP APPLICATION REVIEW PROCESS

AN EXAM APPLICATION MAY BE DENIED FOR THE FOLLOWING REASONS:

• Failure to meet exam eligibility requirements (education and/or experience).
• Incomplete exam application form.
• Missing payment.
• Missing documentation.

IAAP will contact the individual if there is a problem with the application and attempt to resolve the issue. An applicant who does not qualify for the exam or whose application is denied, will receive a full refund less a $50 USD processing fee.

CAP EXAM SCHEDULING

The CAP exam is computer-based through the CAP Program’s test delivery vendor, Assessment Systems. Testing centers are located throughout North America and select international locations. To view a map of the testing locations, visit www.iaap-hq.org/page/Assessmentsys.

After a candidate’s exam application has been approved by IAAP, the individual will receive detailed instructions on how to schedule their exam with Assessment Systems. This information is sent to the approved candidate by email.

Although the CAP Program makes every effort possible to ensure testing centers are available, we cannot guarantee availability of a center, or guarantee a candidate will receive the testing center of their choice.

CONFIDENTIALITY

Information on the certification application, exam application, and the candidates’ performance score on the CAP examination shall remain confidential unless otherwise stipulated by the examinee or as required by law. The CAP Program will release pass/fail information to the employer, educational institution or other third party only at the written request of the candidate. The CAP Program will verify over the phone whether a designee is actively certified for employment background checks.

VERIFICATION OF CERTIFICATION

To receive college credit for certifications like Certified Administrative Professional (CAP), institutions many times ask for the certifying body to verify the credential. IAAP is happy to verify your CAP certification in good standing for a college/university. There is a request form located on the CAP website. If you are a member of IAAP this service is free, for nonmembers it is $30. Please note: CAP designees must be actively certified (participating in recertification) for us to verify the credential.
ACCOMMODATIONS

Accommodations may be available to individuals who have documented disabilities pursuant to the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act of 1973. The CAP Program provides reasonable testing accommodations to candidates whose documented disabilities or other qualifying medical conditions hinder their ability to take the examination under standard conditions.

Examples of requests for special testing accommodations that may be granted include modification of seating or other physical arrangements in the testing facility, or providing for the examination to be taken in an accessible location, providing for a reasonable extension of testing time, providing a sign language interpreter (to assist with audio or spoken components, if any), reader, or other auxiliary aid. All accommodations must be pre-approved by the CAP Program staff. An Accommodations Request Form is available on the CAP website.

Accommodations are provided to qualified candidates with disabilities to the extent that such accommodation does not fundamentally alter the examination or cause an undue burden to the CAP Program or the test administration site. The cost of excessive accommodation requirements is to be borne by the candidate (i.e., electronic communication equipment, etc.).

DIVERSITY

The CAP Program is committed to diversity and equality in all activities. The Program, in both its values and practices, is committed to providing the community of administrative professionals with credentialing practices that are based on inclusion and diversity.

This means that there shall be no barriers to participation in any activity of the Program on the basis of gender, race, creed, age, sexual orientation, national origin, religion, or disability. The Program will seek diversity and inclusiveness in its business practices and it will not condone any form of unlawful discrimination.

The Program recognizes and values the diverse skills, perspectives, and experiences of the community of administrative professionals and believes inclusiveness enhances service to this community.

EXAM OVERVIEW

THE CAP PROGRAM FOLLOWS CERTIFICATION INDUSTRY BEST PRACTICES TO CREATE AND UPDATE THE CAP EXAM. SUBJECT MATTER EXPERTS WHO ARE IAAP MEMBERS AND PRACTICING ADMINISTRATIVE PROFESSIONALS ARE INVOLVED THROUGHOUT THE PROCESS, WHICH IS OVERSEEN BY HIGHLY TRAINED ASSESSMENT EXPERTS AND A PSYCHOMETRICIAN.

The CAP exam is based on the CAP Body of Knowledge, which is developed by practicing professionals and business educators conducting a job analysis study. The goal of the study is to collect qualitative and quantitative data regarding practices conducted by administrative professionals to update the Body of Knowledge used to create the CAP exam to ensure it is clear, comprehensive, and reflective of current practice. This is done approximately every five years.

The Body of Knowledge has a select number of domains, each with specific Performance Outcomes (PO), worth a designated percentage of exam content. PO are detailed, measurable competencies based on current best practices across a myriad of industries, which commonly employ administrative professionals. They represent the central and most significant information, skills, and competencies the candidate should know to pass the exam.
CAP EXAM DOMAINS

1. Organizational Communications (24%)
2. Business Writing and Document Production (22%)
3. Technology and Information Distribution (16%)
4. Office and Records Management (15%)
5. Event and Project Management (12%)
6. Operational Functions (11%)

APPENDIX A CONTAINS THE COMPLETE CAP BODY OF KNOWLEDGE.

TEST FORMAT

All CAP exam questions are written in multiple-choice format and delivered via Assessment System’s approved computerized testing centers. It consists of approximately 300 multiple-choice questions that takes an average of 3½ hours to complete. A question consists of a stem (the question asked or an incomplete statement) and four possible responses. One response is the only correct answer; the other three responses are incorrect.

THE EXAM ASSESSES THREE LEVELS OF COMPETENCY:

- **Fact:** A level of testing that emphasizes recognition of facts, terminology, principles, theories, trends, classification, criteria, or structures.
- **Concept:** A level of testing that emphasizes understanding, translation, interpretation, extrapolation, and communication of concepts, theories, and principles.
- **Application:** A level of testing that emphasizes the ability to apply terms and concepts from other sources to a new situation, to apply principles of a discipline to practical situations, and to relate principles studied to current events.

Core Resource List: A body of literature aligned with the examination content outline will be identified by the CAP Program and designated as the Core Resources. Using these resources and the Body of Knowledge, a panel of certified individuals and/or educators with special training will develop the questions (also referred to as items) for the exam. There is a separate CAP Exam Commission again, composed of certified individuals, that will review questions written by the item writers to ensure alignment with the CAP Body of Knowledge. If approved by the Commission the questions are added to the test bank.

Items written for the CAP examination item bank are referenced to a statement from the CAP Core Resources and a PO in the Body of Knowledge. The Body of Knowledge and the Core Resources are used in preparation of any study guides and should be the sources used by candidates preparing for the exam. Only the item writers and Commission members have access to the actual items on the exam. The reference source for exam items is no older than the oldest reference on the Core Resources.

More information on use of the Body of Knowledge and List of Core Resources is included in a later section titled Preparing for the CAP Exam. This section also includes a listing of the study guides and training available through the CAP Program and other entities.

If upon becoming certified, you wish to become more involved in the exam development process including as an item writer or a member of the CAP Exam Commission, please contact the Manager, Certifications for more information.

Exam Scoring. The passing standard, also referred to as the cut score, for the exam is set using a criterion-referenced methodology by a team of psychometricians experienced in the process of testing and exam scoring. Whenever examinee volumes permit, equating is used to maintain the passing standard across different examination forms presented to different candidates and to statistically adjust scores, as necessary, to compensate for differences in difficulty across examination forms. Simply stated, CAP exam scoring is not based on a specific percentage correct.
After being determined eligible and paying the required exam fee, candidates must schedule and pass the multiple-choice computer-based exam of approximately 300 exam items administered in a single 3 ½ hour period. The exam is offered throughout North America and in select international locations twice a year, every Spring and Fall. The exams are administered within a testing period of 14-15 days.

Within 30 days of the exam completion, the candidate will receive via email a Performance Report. The Performance Report will provide the individual with their total exam score and will indicate if the individual has passed or failed the CAP exam. The Performance Report will also include individual scores by content areas. For security reasons, scores will not be given over the phone. A permanent record of candidate’s Performance Reports is archived through Certifior, the Program’s records management software.

Retesting: Candidates who desire to retake the examination after failing to pass on the first or second attempt must submit the full exam fee and completed application without all the required documentation of the initial application. Documentation of work experience or education is not required. If there is not a passing score after the first two attempts to pass the candidate must wait one year following the second attempt before making a third attempt.

Testing Issues: Issues with the CAP exam testing site, equipment, or monitors experienced by the candidate must be reported within 24 hours after completing the exam. Please contact the Manager, Certifications at certification@iaap-hq.org to document the issue or by phone (816-891-6600) to discuss the issue.

General questions about the CAP exam and/or the scoring process after receiving your score follows a similar procedure. If you decide to make a request for recalculation of scoring by a psychometrist as well as an appeal of exam results this must be submitted in writing no later than 30 days after receipt of the Performance Report. All issues and appeals must be directed to certification@iaap-hq.org using the CAP Certification Appeals Form, located on the website under Certification Forms.

Cancellation of Test Under Extraordinary Circumstances: If a candidate is unable to arrive at a designated exam site because of inclement weather, terrorist acts, or a natural disaster, then the candidate has the option of taking the examination at the next administration testing period without being charged an additional fee. The candidate must notify the Manager, Certification of their inability to arrive and the details as soon as possible with documentation of the circumstances. It will be the decision of the Manager, Certification to confirm the reasons are valid enough for the fee to be waived for the next testing period.

If a designated examination site is rendered unusable as determined by Assessment Systems because of inclement weather, terrorist acts, a natural disaster, or other similar circumstances then the examination will be rescheduled to the next testing period. There will be no additional fee.

The decision to cancel testing at a site during the testing period will be made by the Manager, Certification in consultation with Assessment Systems.

Delay of Exam Date: Candidates may delay their exam to the next available testing period after approval of the application provided the request is submitted directly to the CAP Program at least 14 days before the testing period begins. If less than 14 days the exam date cannot be delayed and it is considered a Failure to Take the Exam. A rescheduling fee of $150 shall be required. The CAP Exam Request to Reschedule Form, is located on the website under Certification Forms.

Upon two delays to the next testing period and payment of two rescheduling fees the exam fee is forfeited. After a waiting period of six months, a new application must be filed and the exam fee paid to qualify to take the exam. The Qualifying Administrative Experience is not required to be filed as long the new application is within three years of the date of the initial application.
Delay of Exam Date Due to Emergency: If a candidate provides verifiable and documented notice to the CAP Program within seven days after the last day of the testing period stating due to a documented medical or personal emergency the candidate was forced to delay taking the exam, there shall be no rescheduling fee. The case of an emergency is decided on a case-by-case basis by the Manager, Certification. The individual will be required to reschedule to the next testing period without payment of a fee or to later testing periods with payment of a rescheduling fee.

Failure to Take the Exam: Once the application is accepted the exam fee or rescheduling fee is non-refundable regardless of further action by the applicant to take the exam or not including but not limited to:

- Failure to show up for a CAP exam as scheduled by the candidate.
- Cancellation or delay to the next exam period without proper notice as described above.
- Failure to schedule an appointment with Assessment Systems within the CAP exam testing period.

PREPARING FOR THE CAP EXAM

THERE ARE MANY RESOURCES YOU CAN USE TO MAKE SURE YOU FEEL CONFIDENT AND PREPARED WHEN YOU TAKE YOUR EXAM.

The first step is to download the CAP Body of Knowledge and take the time to review each domain, performance outcome, and sub-point. Highlight the areas you believe might be weak areas for you and use that information to map out your study plan. For example, for content areas you have a good understanding of and use every day, you may only need to do a quick review to prepare for the test, whereas for areas with which you are less familiar, you may decide that you need more in-depth study or training before taking the test.

The CAP Program recommends creating a written study plan, no matter what methods of study you use. This will help ensure you dedicate the time necessary to feel confident about taking the exam.

You may choose to study on your own or you may decide to take a seminar/workshop to gain a better understanding of one or more content areas. If you know other individuals in your area who are taking the exam, you may want to form a study group. Additionally, some certified individuals offer virtual study groups to help candidates prepare for the exam. The groups are not affiliated with IAAP or the CAP Program, however we do list their contact information on the website under CAP Preparation.

Below is a list of preparation materials and resources available to CAP candidates. Everyone should carefully select which will help them best prepare for the exam based on preferred learning styles and current knowledge base. The listing of these materials is informative in nature. The CAP Program does not intend the list to imply endorsement of specific texts, neither are the questions on the test taken directly from these texts, nor is a passing score guaranteed by use of these materials and resources.

- IAAP CAP Study Guide* is a great resource to get started with your studies. The CAP Study Guide was developed by subject-matter experts using the CAP Body of Knowledge.
- IAAP CAP Exam Prep SmartBook* developed by McGraw-Hill Education takes the CAP Study Guide to a new level of exam preparation using adaptive learning technology. A continually personalized reading experience is created by highlighting the most impactful concepts you need to learn at that moment in time.
- Practice CAP Exam - For those planning to sit for the CAP exam, this practice exam is an additional resource to help your test-taking skills within a timed multiple-choice computerized environment. This exam can be taken on your own computer and contains retired CAP exam questions. The structure of the practice exam is similar to the actual test, and must be completed within three and half hours. Two attempts are included. You can find this via Learn@iaap ‘CAP Preparation’ on the IAAP website.
• CAP Core Resources is the list of books and publications from which the actual questions are developed and consistent with what is outlined in the BOK:
• HigherEd.org in cooperation with the IAAP aligned the CAP Body of Knowledge with free or low cost online resources.

*The International Association of Administrative Professionals (IAAP) does not endorse any study materials, groups, or exam preparation courses. The IAAP Certified Administrative Professional Study Guide - Preparation Reference for 2017 CAP Exam was developed by subject-matter experts using the CAP Body of Knowledge who did not have access to or knowledge of current CAP Exam questions. The Certified Administrative Professional (CAP) exam is governed by the Certification Administrative Board (CAB) whose members are not involved with the development or administration of any preparatory resource.

USE OF THE CAP DESIGNATION

IF A CANDIDATE TAKES AND PASSES THE CAP EXAM, THEY EARN CERTIFICATION AND THE USE OF THE CAP DESIGNATION AFTER THEIR NAME FOR A PERIOD OF THREE YEARS BEFORE HAVING TO RECERTIFY.

EXAMPLE:
Correct: Jane Doe, CAP
Incorrect: Jane Doe, Certified Administrative Professional

CAP Certification is required to hold a specialty, such as Organizational Management (OM). There is no CAP-OM certification; only CAP certification with a specialty of OM. Some designees choose to include their specialties after CAP.

NOTICE TO CAP CERTIFICANTS CERTIFIED PRIOR TO 2018 TESTING PERIOD:

With the launch of the new exam and application for accreditation of the CAP, changes are being made in the designation used by individuals who previously earned the OM or TA specialty. Effective November 1, 2017, these two specialties and any other certificate programs in the future may not be used as part of the certification designation. Earning a certificate is different from earning a certification. The major differences are that a certificate does not require recertification or meeting continuing education requirements. This has always been the case with OM and TA specialties so the only difference is how they are used.

THE FOLLOWING IS THE CORRECT AND INCORRECT USAGE:

EXAMPLE:
Correct: Jane Doe, CAP, OM, TA
Incorrect: Jane Doe, CAP-OM, CAP-TA
MAINTAINING CAP CREDENTIAL THROUGH RECERTIFICATION

Recertification dates are either May 31 or November 30. The May date is for the Spring designees who in their history took the exam before June 1 and November is for fall designees who took their exam after June 1. For instance, if you acquired your CAP in March 2014, your recertification deadline is now and will remain May 31, 2019.

In 2018, we will be moving from a five-year to a three-year recertification cycle. This will not affect current CAP designees until it is time for their current five-year cycle to end, then they will have a three-year cycle. Using the above example, upon recertification by May 31, 2019 the new recertification date will be May 31, 2022.

Beginning with the Spring 2018 CAP testing, all of those passing the exam will be required to recertify every three years. The CAP Program is not changing the recommended number of professional development points. It will remain at an average of 12 points per year, making the requirement 36 points every three years.

QUALIFYING ACTIVITY CATEGORIES

RECERTIFICATION POINTS CAN BE EARNED IN THREE CATEGORIES:

- Professional Development.
- Industry-Specific Professional Development.
- Leadership.

It is not necessary to earn points in every category, but it is mandatory to have at least 20 of the 36 points in the Professional Development category. Points in the categories of Industry-Specific Professional Development and Leadership are optional and limited to 15 points per category.
<table>
<thead>
<tr>
<th>Category</th>
<th>Description/Examples</th>
<th>Points per 3-year cycle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Development</td>
<td><strong>Continuing education</strong> activities including</td>
<td>Required category</td>
</tr>
<tr>
<td></td>
<td>• Conferences (seminars/programs)</td>
<td>20 points required; No maximum</td>
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<td></td>
<td>• Web-based courses (workshops)</td>
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<td></td>
<td>• E-learning (self-paced and instructor-led)</td>
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<td>• IAAP Approved Local Area Network (LAN) programs</td>
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<td>• Self-study materials, such as</td>
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<td>• Crisp 50-minute books</td>
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<td>• Book reports</td>
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<td>• IAAP Options Technology modules</td>
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<td><strong>Formal education</strong>, such as</td>
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<td>• College/University courses</td>
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<td><strong>Others, such as</strong></td>
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<td></td>
<td>• CAP designee specialty certificate, i.e. Organizational Management (OM), Technology Applications (TA).</td>
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<td>• Microsoft Office Specialist (MOS) certification</td>
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<td>• Toastmasters or other similar achievement recognitions</td>
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<td>• Presenter of CAP approved program</td>
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<td>• Presenter of CAP overview*</td>
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<td><strong>In all cases, the education must align with the CAP Body of Knowledge.</strong></td>
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<td>*Presenter of CAP overview must use approved presentation materials obtained through IAAP HQ. Max of 5 points per cycle.</td>
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<td>Industry-specific Professional Development</td>
<td><strong>Continuing education</strong> activities including</td>
<td>Optional category</td>
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<td></td>
<td>• Conferences (seminars/programs)</td>
<td>No minimum; 15 points maximum</td>
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<td><strong>In all cases, the activity must provide transferable skills within an industry; such as banking, education, healthcare, and relevant to the duties of an admin or office professional in an office environment.</strong></td>
<td></td>
</tr>
<tr>
<td>Leadership</td>
<td>Elected or appointed positions, including but not limited to</td>
<td>Optional category</td>
</tr>
<tr>
<td></td>
<td>• President</td>
<td>No minimum; 15 points maximum</td>
</tr>
<tr>
<td></td>
<td>• Vice President</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Treasurer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Secretary</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Chair, as defined in this Handbook</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>IAAP-specific positions, including</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Board Member</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• LAN Director</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Branch Director</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Branch Supporting Position</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Others as specified in this Handbook</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Lead Coordinator of an CAP or OM Course or Study Group</td>
<td></td>
</tr>
</tbody>
</table>

In all cases, the education must align with the CAP Body of Knowledge.

*Presenter of CAP overview must use approved presentation materials obtained through IAAP HQ. Max of 5 points per cycle.
PROFESSIONAL DEVELOPMENT

Continuing education in the category of Professional Development must align with the CAP Body of Knowledge and provide a minimum of 15 minutes of education, then in 15 minute increments. See examples below.

CALCULATING PROFESSIONAL DEVELOPMENT ACTIVITIES

<table>
<thead>
<tr>
<th>Activity</th>
<th>How Calculated</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conferences</td>
<td>Points are determined by the education time spent on activity.</td>
<td>15 minutes = .25 point&lt;br&gt;30 minutes = .5 point&lt;br&gt;60 minutes = 1 point&lt;br&gt;75 minutes = 1.25 points&lt;br&gt;90 minutes = 1.5 points</td>
</tr>
<tr>
<td>Seminars/programs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workshops</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IAAP Approved LAN programs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*In all cases, education must align with the CAP Body of Knowledge*

<table>
<thead>
<tr>
<th>Activity</th>
<th>How Calculated</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web-based courses</td>
<td>Points determined by the approximate education time as published by the provider.</td>
<td>Crisp 50-Min Book = 2 points per book&lt;br&gt;Options Technology = 6 points per module</td>
</tr>
<tr>
<td>E-learning (Instructor-led and self-paced)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-study materials or courses, such as</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Crisp 50-minute books</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• IAAP Options Technology modules</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Lynda.com</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Ed2go.com</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*In all cases, education must align with the CAP Body of Knowledge*

<table>
<thead>
<tr>
<th>Activity</th>
<th>How Calculated</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>University or College Courses</td>
<td>15 points per credit</td>
<td>1 credit course = 15 points&lt;br&gt;3 credit course = 45 points</td>
</tr>
</tbody>
</table>

*In all cases, education must align with the CAP Body of Knowledge*

<table>
<thead>
<tr>
<th>Activity</th>
<th>How Calculated</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>IAAP OM* and TA specialty</td>
<td>Points determined by either the contact hours or approximate education time.</td>
<td>OM exam, prior to 2017 = 5 points&lt;br&gt;TA specialty = 5 points</td>
</tr>
<tr>
<td>IAAP OM specialty</td>
<td>40 points</td>
<td>OM 8-week online program = 40 points</td>
</tr>
</tbody>
</table>

*OM or TA earned prior to 2017, is 5 points*

<table>
<thead>
<tr>
<th>Activity</th>
<th>How Calculated</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Office Specialist (MOS)</td>
<td>5 points per certification</td>
<td>MS Word certified = 5 points&lt;br&gt;MS Excel certified = 5 points</td>
</tr>
<tr>
<td>Notary*</td>
<td>5 points</td>
<td>5 points per recertification cycle</td>
</tr>
</tbody>
</table>

*With proof of education/training or if education/training is required by the State*

<table>
<thead>
<tr>
<th>Activity</th>
<th>How Calculated</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toastmasters achievement recognition</td>
<td>2 points per recognition</td>
<td>CC = 2 points&lt;br&gt;DTM = 2 points</td>
</tr>
<tr>
<td>e.g. Competent Communicator (CC) or Distinguished Toastmaster (DTM)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presenter* of IAAP Approved program</td>
<td>1 point for prep time</td>
<td>2 hours education time&lt;br&gt;+ 1 hour prep time = 3 points.</td>
</tr>
</tbody>
</table>

*Note: Individuals whose job includes educating others (e.g. teachers, instructors, those who train staff) do not receive recertification points for training they have conducted as part of their employment.*

*Professional development is a required category in which you will need at least 20 points.*

NOTARY

13 CERTIFICATION HANDBOOK
The requirements for being a Notary vary among each state. Some states have very strict guidelines, requiring an individual to complete training and pass an examination, while other states do not.

**TO RECEIVE CREDIT FOR BEING A NOTARY:**

- Your commission must be in a state that requires you take training courses and/or pass an examination.

  or

- You must verify having successfully completed the training and/or passed a voluntary examination.

It is not necessary that you earned or renewed your commission within your recertification cycle. However, your commission must be active at the time you apply for recertification. You may only claim credit for being a Notary once within your recertification cycle.

Notaries who have not participated in training courses and/or passed an examination, or those who are not commissioned in a state that requires you to pass an examination, are not eligible to claim recertification credit.

**TOASTMASTERS**

Individuals who participate in the Communication or Leadership tracks offered by Toastmasters International will receive two recertification points for each achievement completed.

The achievement recognitions within the Communication and Leadership tracks are:

**Communication:**
- Competent Communicator (CC).
- Advanced Communicator Bronze (ACB).
- Advanced Communicator Silver (ACS).
- Advanced Communicator Gold (ACG).

**Leadership:**
- Competent Leader (CL).
- Advanced Leader Bronze (ALB).
- Advanced Leader Silver (ALS).
- Distinguished Toastmaster (DTM).

**INDUSTRY-SPECIFIC PROFESSIONAL DEVELOPMENT**

To qualify for recertification in the category of Industry-Specific Professional Development, the activity must be specific to an industry; such as banking, insurance, healthcare, education, government, etc. and transferrable within that industry. Additionally, the activity must be relevant to the duties of an administrative or office professional in an office environment. Activities that are unique to your company do not qualify for recertification.

**Here are a few examples:**

An admin who works for XYZ Insurance Company may find it necessary to know common insurance terms. This knowledge would be transferrable within the industry should the admin accept a position for another insurance company. This type of training would qualify for CAP recertification.

An admin who works for A&E Company is required to complete the Company’s annual Code of Ethics/Code of Conduct training. Since this type of training includes rules, regulations, and policies unique to A&E Company, this would not qualify for CAP recertification.

An admin who works for Mercy Hospital is required to have yearly CPR training. Although this training is usually required in the healthcare industry, it is not education that directly supports the administrative profession in an office environment. This type of training would not qualify for CAP recertification.

Industry-Specific Professional Development is an optional category and limited to 15 IAAP CAP recertification points.
### Calculating Industry-Specific Professional Development Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>How Calculated</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conferences</td>
<td>Points are determined based on actual education time spent on activity.</td>
<td>15 minutes = .25 point</td>
</tr>
<tr>
<td>Seminars</td>
<td></td>
<td>30 minutes = .5 point</td>
</tr>
<tr>
<td>Workshops</td>
<td></td>
<td>60 minutes = 1 point</td>
</tr>
<tr>
<td>E-learning (instructor-led)</td>
<td></td>
<td>75 minutes = 1.25 points</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90 minutes = 1.5 points</td>
</tr>
<tr>
<td>Web-based courses</td>
<td>Points determined based on education time as published by the provider.</td>
<td>30 minutes = .5 point</td>
</tr>
<tr>
<td>E-learning (self-paced)</td>
<td></td>
<td>60 minutes = 1 point</td>
</tr>
<tr>
<td></td>
<td></td>
<td>75 minutes = 1.25 points</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90 minutes = 1.5 points</td>
</tr>
</tbody>
</table>

In all cases, the education must provide transferable skills within an industry; banking, education, healthcare, etc., and fall within the realm of admin or office professional duties.

### Documenting Professional Development (Including Industry-Specific Professional Development)

You could be asked to provide supporting documentation if your application is audited or if additional details are needed to determine eligibility of points. Recertification credit might not be awarded if your documentation does not support the activity.

**For Professional Development, the documentation should support each of the following:**

- Verification of attendance or completion.
- Session or course title and description.
- Date.
- Length.

**Additionally**

- If you attend a conference or meeting, list the specific sessions you attended. Only indicating the conference or meeting name is not sufficient.
- Specific dates must be provided. Submitting a range of dates is not sufficient.
- Only education time should be considered when calculating points. Do not include non-education activities such as receptions, meals, breaks, exhibit hall sessions, or networking.

**Acceptable Forms of Documentation**

Usually a certificate will be sufficient in verifying your attendance, education topic, date, and length—but not always. It may be necessary to attain a combination of documents to ensure you are able to support each key element of the activity.

A few examples include:

- Certificate of completion or attendance.
- Email thanking you for participating (often sent after a webinar).
- Course program or outline.
- College transcript.
- Company transcript.
- Letter or other information from the provider.
CEU, CPE, College Credit, and Other Units of Measurements

Continuing Education Unit (CEU), Continuing Professional Education (CPE), and college credit are other measurements of education.

- **.1 CEU = 1 hour of education, or 1 CAP recertification point**; **.5 CEUs = 5 hours, or 5 points.**
- One CPE = 50 minutes of education, **6 CPEs = 5 hours, or 5 CAP recertification points.**
- One college credit = 15 CAP recertification points; a three-credit course is 45 points.

Eligible programs published as “1-day” or “all day” will be awarded 6.5 CAP recertification points. If the program provided more than 6.5 hours of education, for example a working lunch hour instead of an hour break in education, supplemental documentation would be necessary to support the additional time.

**Leadership**

Approved leadership positions are those of a standing committee in which a person has specific responsibilities and duties that directly support the organization or committee. Typically, the person serving in an Officer or Chair position is elected or appointed by the members. Additionally, the person must have served at least 7 of 12 months within the leadership role.

Volunteer work does not qualify for recertification. For instance, volunteering to organize an event such as a golf tournament; chairing a time-based project such as a yearly audit or United Way campaign; or being asked to perform a task, such as working at a registration table do not qualify for points.

Leaderhip is an optional category and limited to 15 CAP recertification points.

**Documenting Your Leadership Position**

For leadership positions served, other than IAAP or CAP positions, obtain a letter from the organization that includes the position held, primary duties of the position, and dates of term.

<table>
<thead>
<tr>
<th>Current Positions within IAAP</th>
<th>How Calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branch Director</td>
<td>10 points</td>
</tr>
<tr>
<td>IAAP Board of Directors</td>
<td></td>
</tr>
<tr>
<td>The Foundation of IAAP Board of Directors</td>
<td></td>
</tr>
<tr>
<td>CAP Exam Commission</td>
<td></td>
</tr>
<tr>
<td>Certification Advisory Board</td>
<td></td>
</tr>
<tr>
<td>LAN Director</td>
<td></td>
</tr>
<tr>
<td>Branch supporting positions*</td>
<td>3 points per position, per year</td>
</tr>
<tr>
<td>*Branch Membership Chair, Social Media Chair, Communications Chair, and Branch Event Chair</td>
<td></td>
</tr>
<tr>
<td>Lead facilitator of study group or course</td>
<td>2 points per year</td>
</tr>
<tr>
<td>LAN supporting positions*</td>
<td>2 points per year</td>
</tr>
<tr>
<td>*LAN Membership Chair and Communications Chair</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Previous Positions within IAAP (2015 and prior)</th>
<th>How Calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td>IAAP Board of Directors</td>
<td>Membership Chair</td>
</tr>
<tr>
<td>Foundation Board of Regents</td>
<td>Certification Chair</td>
</tr>
<tr>
<td>President</td>
<td>Education/program Chair</td>
</tr>
<tr>
<td>President-elect</td>
<td>Newsletter Chair</td>
</tr>
<tr>
<td>Vice President</td>
<td>Webmaster</td>
</tr>
<tr>
<td>Secretary</td>
<td>Student Chapter Chair</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Bylaws and Standing Rules Chair</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Retirement Trust Foundation Chair</td>
</tr>
<tr>
<td></td>
<td>5 points per position, per year</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Positions outside IAAP</th>
<th>How Calculated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board member</td>
<td>Secretary</td>
</tr>
<tr>
<td>President</td>
<td>Treasurer</td>
</tr>
<tr>
<td>Vice President</td>
<td>Officer or Chair as defined above</td>
</tr>
<tr>
<td></td>
<td>5 points per position, per year</td>
</tr>
</tbody>
</table>
RECERTIFICATION OVERVIEW

TRACK YOUR POINTS:

As soon as you certify or recertify, start a spreadsheet (or something similar) to track points as earned. We encourage you to set a goal of 10-12 points each year, rather than wait and struggle to gain points at the end of your three-year cycle. Think of your recertification activities as your professional development portfolio which can be used during performance evaluations and job interviews.

A sample recertification spreadsheet is available on the IAAP website under Recertification to track your progress.

In addition to your spreadsheet of points earned, start a file of your supporting documentation. For all professional development, your supporting documentation must verify attendance and include:

- The subject and/or description of education.
- Date of completion.
- Length of education.

For leadership positions, attain a letter from the organization that includes:

- The position held.
- Primary duties of the position.
- Length of term served.

When you have earned at least 36 points and are due to recertify, you will submit an application, fee, and your spreadsheet of points earned within your three-year cycle.

RECERTIFYING EARLY

You can submit your recertification six-months prior to your due date, once 36 points are earned, and your date will remain the same, either May 31 or November 30. However, additional points over the required 36 do not carry over to your next cycle and new activities do not qualify until after your recertification date has passed.

Extensions: Individuals who have missed their recertification due date are given a 120-day grace period in which they can submit a late application. No special permission is necessary if applying within the grace period. The grace period is not extra time to accumulate points; it is additional time to submit the information. All points submitted must be earned within the original three-year cycle. Individuals are required to pay the recertification fee, plus a late fee when applying for recertification during the grace period. If the application is approved, recertification will remain at the month/year originally due.

RECERTIFICATION FEES

IAAP Member $100 USD
Nonmember $250 USD
Late fee $100 USD (within 120-day grace period)

DUE PROCESS AND APPEALS

For a detailed list of all CAP Program policies for appeals please refer to the Certified Administrative Professional Policies and Procedures, a publicly available document on the CAP Web page.

Appeal Policy: This appeal is only for 1) individuals who experienced extenuating circumstances which prevented them from earning points or applying for recertification within their three-year cycle or 2) individuals who did earn the points within the three years but are beyond the 120-day grace period. The individual must submit an appeal before applying for recertification. Examples that may be cited in the appeal include, but are not limited to, serious personal illness, serious illness of a family member, tragic event, long-term unemployment, or military deployment. If the appeal is approved, the individual may be given additional time to earn points or to submit their application past the 120-day grace period. Even if the appeal is successful the payment of any recertification fee or late fee will be required.
Appeals may be sent to certification@iaap-hq.org, using the CAP Program Certification Appeal Form and should include the circumstances, documentation, and your plan for gaining the required points. All appeals will be reviewed by the Certification Administration Board, whose decision is final.

**Grandfathering:** All candidates seeking to hold a CAP credential must successfully pass or have previously passed the certification examination to earn the CAP credential. The CAB does not permit the “grandfathering” of another certification, i.e., accept another organization’s certification or alternate pathway, in lieu of meeting the eligibility requirements or for waiving the requirements to take the examination and achieve a passing score on the examination.

**Expired Status:** CAP credentials are revoked if designee fails to comply with the mandatory recertification requirements. To become certified again, a new application and taking the current exam again is required.

## RETIRED STATUS

CAP holders who retire from the profession prior to their recertification due date and have been recertified at least one time will have the following options:

1. Maintain active CAP certification by obtaining the required amount of Recertification Qualification Activities. This option requires no notification to the CAP Program. Designees will continue in the regular recertification process, including application, fees, and tracking spreadsheet.

2. Transition to CAP (Ret.) – which is not an active certification but will allow previous CAP holders to use the classification indicating they were CAP certified and are now retired from the workforce, thus are not maintaining the credential. A one-time fee is assessed at the time of application for the CAP (Ret.) classification.

### RETIRED STATUS FEES

- IAAP member $175 USD
- Nonmember $285 USD

If the certified individual originally earned the Certified Professional Secretary (CPS) rating and then transitioned to CAP, those individuals may keep the CPS credential.

Persons who are granted Retired Status, CAP (Ret.) must be fully retired from serving as an administrative professional or any advanced work in business management. This includes part-time or full-time or as an employee consultant or independent contractor. The individual must remain fully retired and must notify the CAP Program of any change in employment circumstances that would render the individual ineligible for Retired Status and require a reactivation.

Individuals who obtain Retired Status have the following options to reactivate their CAP:

1. If the application for CAP reactivation is within two years of the last date of being a CAP in good standing, the individual may submit a Reactivation Application and an Administrative Reactivation Fee. Such individuals are exempt from meeting the requirement for earning the Recertification Qualifying Activity points required in recertification, but will be required to meet all requirements on subsequent recertification.

2. If more than two years has passed since the last date of being a CAP in good standing the individual must meet eligibility requirements, submit a qualifying application and fees, and achieve a passing examination score.

Individuals who return to the workforce from Retired Status must notify the CAP Program and they will be returned to Active Status using the process described above. They are required to pay the Administrative Reactivation Fee and all future recertification will require payment of the recertification fee and meeting of continuing education requirements.

Individuals who return to employment from Retired Status that fail to follow the process to reactivate their CAP may notify the CAP Program of this change in employment status and request removal from CAP or CAP (Ret.) status which shall be granted.
The CAP® (Certified Administrative Professional) is a professional certification geared toward office and administrative professionals. It is the only recognized professional certification in the administrative field that encompasses all areas of the profession. The tasks and responsibilities of those working in administrative professions are as varied and vast as the number of firms employing them. Whether a first-level support for the manager of a community non-profit, the project lead for a city in the Midwest, or the executive assistant to the chief executive officer of a Fortune 500 company, administrative professionals must possess many skills and talents.

The CAP exam is based on the CAP Body of Knowledge, which is developed by practicing professionals and business educators conducting a job analysis study. The goal of the study is to collect qualitative and quantitative data regarding practices conducted by administrative professionals. The resulting data updated the Body of Knowledge used to create the CAP exam to ensure it is clear, comprehensive, and reflective of current practices. This is completed approximately every five years.*

Under each of the six functional area domains are performance outcomes. POs (Performance Outcomes) are detailed, measurable competencies based on the most significant knowledge and skills administrative professionals should know to be successful in their positions, in support of the well-being of the organization. Under each PO are bullet points tying the competency to specific business and/or office functions.

*A job analysis was conducted in Fall of 2017. This Body of Knowledge is applicable for the Fall 2018 CAP exam and subsequent exams until another job analysis is conducted.

**CAP Exam Domains**

1. Organizational Communication 24%
2. Business Writing and Document Production 22%
3. Technology and Information Distribution 16%
4. Office and Records Management 15%
5. Event and Project Management 12%
6. Operational Functions 11%

Note: The percentages after each domain indicate how much of the exam covers that subject matter. For example, approximately one quarter of the questions on the CAP exam relate to Organizational Communication and its performance outcomes.
**CAP Core Resources***

Each domain lists subject-specific recommended readings; however, these four textbooks contain a wide variety of content covered on the CAP examination. These resources serve as good general reference material when studying.


*Questions written for the CAP examination are referenced to one the CAP Core Resources and/or recommended readings or similar texts on the topic from the same date range.

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**DOMAIN ONE: ORGANIZATIONAL COMMUNICATION**

**Recommended Readings for Organizational Communication**


**Related College Courses**

- Business Communication
- Introduction to Organizational Leadership
- Principles of Business Management
- Organizational Communication

**PO 1: Describe the concepts and applications of communication, management, and leadership models/theories within organizations.**

- Identify the various types of communication (written, verbal, nonverbal, interpersonal, group, public) and which is the most effective for different business situations
- Describe management/leadership theories and how they relate to effective organizational communication

**PO 2: Describe the process of effective interaction with internal and external stakeholders of an organization.**

- Demonstrate a basic knowledge and proficiency in managing and resolving conflict within an organization

**PO 3: Recognize the importance and utilization of professional networking.**

- Describe how networking (both in-person and virtual) has changed the way people find jobs and companies recruit new employees
PO 4: Demonstrate an understanding of team dynamics within organizations.
• Identify the different types of teams and describe their purpose
• Describe the specific kinds of dynamics within teams and how they can be managed
• Demonstrate knowledge in effective decision making, communication, and team building

PO 5: Describe the positive and negative types of interpersonal interactions existing within an organization.
• Explain how human motivation affects organizational dynamics
• Demonstrate basic knowledge of the differences between managing and leading
• Explain the dynamics of mentorship and coaching, including the effect on performance

PO 6: Demonstrate knowledge in the techniques of creating and giving presentations.
• Describe how to apply methods of coping with communication anxiety
• Identify the different types of presentations and appropriate usage of each
• Demonstrate knowledge of how to prepare for and deliver a presentation

PO 7: Demonstrate the ability to conduct business with diverse cultures.
• Describe international business practices with regard to cultural norms and rituals
• Demonstrate knowledge of the importance of multicultural communication in today’s workplace

PO 8: Demonstrate a basic knowledge in organizational structure, systems, and strategies including their role in productivity and effective management.
• Describe the parts of a strategic plan and how it affects organization performance
• Define various organization management systems that examine productivity (such as Six Sigma and TQM)

PO 9: Describe how confidentiality, legality, and ethics are important for the functioning of an organization.
• Understand basic employer and employees’ rights with regard to legality

DOMAIN TWO: BUSINESS WRITING AND DOCUMENT PRODUCTION

Recommended Readings for Business Writing and Document Production

Related College Courses
Business English
Business Communication
Introduction to Word Processing
Desktop Publishing for the Office

PO 1: Demonstrate knowledge of terminology associated with business writing and document production.
• Identify the different functions of correspondence, documents, and reports within an organization
• Describe which method is best for creating and distributing reports and documents within an organization
• Identify best practices for developing business communications such as research, audience analysis, and composition
PO 2: Exhibit proficiency in proofreading and editing documents.
• Demonstrate knowledge of document readability for business communication
• Identify and describe the most important steps when editing and proofreading
• Apply the basics of copy editing for various types of documents

PO 3: Demonstrate proficiency in the use of grammar, spelling, and sentence construction.
• Demonstrate ability to apply basic rules of English grammar, especially spelling, punctuation, capitalization, and sentence construction

PO 4: Describe the steps required to create and edit different types of business documents.
• Demonstrate an ability to determine and develop materials for the appropriate audience for different types of business documents
• Exhibit knowledge of which software applications are appropriate to produce common business documents (e.g., MS Word, Google Docs, Adobe Acrobat)
• Demonstrate proficiency in spreadsheet creation, including simple formulas and data manipulation
• Understand the application and use of presentation software (e.g., MS PowerPoint, Prezi, etc.)

PO 5: Describe the features and tools used in desktop publishing for newsletter, flyers, etc.
• Exhibit knowledge of desktop design software including features and functions
• Identify important aspects of layout and design
• Demonstrate a familiarity with online tools for web publishing
• Recognize basic graphic design tools for office and web publishing

PO 6: Identify the necessary elements needed to create and present effective charts and graphs.
• Demonstrate knowledge of software applications used to create, format, and insert charts, tables, and graphs into business documents and presentations

PO 7: Identify the important elements necessary for finishing a document (e.g., binding, collation, stapling, coloring, graphics, etc.)
• Describe the key differences and requirements for electronic versus hard-copy output of documents

PO 8: Demonstrate proficiency in the creation of minutes for meetings.
• Identify how to prepare minutes for a meeting, capturing the essence of agenda items and actions taken

DOMAIN THREE: TECHNOLOGY AND INFORMATION DISTRIBUTION

Recommended Readings for Technology and Information Distribution

Related College Courses
Business Computer Applications
Business Office and Administrative Procedures
Introduction to Computing
PO 1: Describe the process of information distribution within an office environment.
• Demonstrate knowledge in how to organize distribution lists for various types of communications

PO 2: Identify the important differences between traditional and electronic distribution of information.
• Demonstrate knowledge and proficiency of different email interface types
• Know which software and technology is available for distributing information

PO 3: Identify copyright laws, regulations regarding intellectual property, and ways to maintain confidentiality when distributing information.
• Identify proper attribution of quotations from published documents

PO 4: Describe the process and techniques of gathering, compiling, and analyzing data.
• Exhibit knowledge of which software applications are appropriate for compiling, storing, and analyzing data
• Demonstrate a clear understanding of which data are appropriate to collect and why
• Demonstrate a proficiency in creating a well-organized report with regard to organization and data visualization

PO 5: Demonstrate knowledge in the use of the Internet, including social media, as a way of distributing information.
• Identify and describe the important characteristics of sending email (e.g., etiquette, attachments, formatting, etc.)
• Demonstrate knowledge and proficiency in social media usage and etiquette
• Exhibit knowledge of which social media applications are appropriate for a specific task and how to use them

PO 6: Demonstrate basic knowledge in the installation, maintenance, and troubleshooting of both equipment and software.
• Identify various computer hardware used in an office
• Demonstrate knowledge of basic office software and functions
• Identify available online resources for equipment and software training and usage

PO 7: Demonstrate basic knowledge in the use of different types of computer systems.
• Identify potential issues with compatibility of different operating systems, such as Microsoft and Apple

PO 8: Describe common ways of storing and transferring data and the types of media appropriate for each.
• Demonstrate knowledge and proficiency in identifying file types and the appropriate ways of converting documents
• Exhibit knowledge of software programs used for document conversion
• Identify and describe common procedures of backing up electronic information and databases, including cloud storage

PO 9: Explain appropriate security procedures for maintaining, backing up, and storing information.
• Demonstrate knowledge of legal issues regarding the storing of electronic information

DOMAIN FOUR: OFFICE AND RECORDS MANAGEMENT

Recommended Readings for Office and Records Management

Related College Courses
Records Management
Business Office and Administrative Procedures

PO 1: Demonstrate knowledge of basic terminology associated with records management using ARMA Guidelines.
• Prove knowledge of terms such as metadata, records retention, and data archiving
• Demonstrate familiarity with terms used by ARMA and general records management

PO 2: Identify the key advantages and disadvantages of electronic and manual (paper) file management based on ARMA Guidelines.
• Demonstrate usage of both paper and electronic filing systems as appropriate based on access requirements and organizational needs

PO 3: Demonstrate knowledge of both electronic and manual (paper) filing rules and standards based on ARMA Guidelines.
• Describe types of electronic files, naming conventions, options for accessing, and methods of altering information
• Exhibit knowledge of available software, systems, and services for electronic filing
• Describe the different methods for creating, storing, and retaining files

PO 4: Identify the appropriate security for both electronic and manual files.
• Identify the key laws regarding record storage and confidentiality
• Describe both the strengths and weaknesses of types of record and file security

PO 5: Demonstrate knowledge of file retrieval, maintenance, and retention.
• Describe how to develop a record retention schedule for both electronic and paper files

PO 6: Identify appropriate ergonomics for a productive personal workspace.
• Describe the significant elements of workspaces and why they are important to efficient and effective working conditions

PO 7: Demonstrate knowledge of resources necessary to efficiently manage an office.
• Describe the steps in placing and receiving supply orders
• Describe the process of creating and distributing an RFP (Request for Proposal)

PO 8: Identify the important methods of checking and maintaining office supplies.
• Identify the steps involved in creating inventory lists
• Recognize types of software appropriate for maintaining inventory

PO 9: Demonstrate knowledge of functioning in a virtual office.
• Identify both the advantages and disadvantages of virtual offices versus traditional offices

DOMAIN FIVE: EVENT AND PROJECT MANAGEMENT

Recommended Readings for Event and Project Management
Related College Courses
Basics of Project Management
Event Management

PO 1: Demonstrate knowledge of basic terminology associated with meeting and event management.
• Identify the necessary elements in planning events ranging from internal meetings to external conferences

PO 2: Demonstrate proficiency in travel preparation.
• Describe the necessary elements for planning and organizing travel, both domestically and internationally

PO 3: Describe the key requirements for meetings both in person and virtual.
• Describe the steps required in the organization and planning of professional meetings
• Exhibit knowledge of which software applications are appropriate for online meetings

PO 4: Demonstrate knowledge in prioritizing and delegating elements of a project from planning to implementation.
• Identify and describe the important techniques of time management from the planning stage to the implementation of a project
• Demonstrate the ability to identify and evaluate the skills and competencies of others for project delegation

PO 5: Describe the steps required in organizing, planning, and managing a project.
• Demonstrate proficiency in prioritizing and organizing work tasks
• Identify which software and technology tools are appropriate for managing a project
• Demonstrate knowledge of negotiating, budget review, and bill explanation when organizing a project

DOMAIN SIX: OPERATIONAL FUNCTIONS

Recommended Readings for Operational Functions

Related college courses:
Human Relations
Introduction to Business
Introductory Accounting

PO 1: Demonstrate knowledge in the duties and processes of human resources.
• Identify different forms of harassment in the workplace
• Describe the ways to address employee situations professionally and legally
• Identify approaches to and the importance of following organizational policies and procedures
• Demonstrate knowledge of and purpose for performance evaluations

PO 2: Describe the various methods of recruitment, staffing, and hiring practices.
• Define different interview types and processes
• Demonstrate the ability to determine the staffing requirements of an organization
PO 3: Recognize why cultural and generational diversity is important for organizations.
• Describe how differing cultural and generational perspectives can benefit an organization
• Identify what should be included in diversity training within an organization

PO 4: Demonstrate a basic knowledge of the procedures involved in onboarding and offboarding employees within organizations.
• Describe the process of scheduling orientation and completing required paperwork

PO 5: Identify basic terminology associated with the financial functions of the organization.
• Distinguish between terms such as assets, liabilities, overhead, and balance sheet
• Describe the key differences between a budget, a profit and loss statement, and a statement of cash flow

PO 6: Demonstrate a knowledge of budgets and financial statements.
• Describe how to track electronic credits and debits on bank statements
• Demonstrate a proficiency in how to read a financial statement
• Describe the process of creating, tracking, and balancing a budget
• Identify the procedures and management of handling petty cash

PO 7: Identify important elements of the banking process and transactions.
• Identify the appropriate forms for depositing, withdrawing, and transferring cash
• Describe how to record, report, and document cash and checks
• Describe safe and secure money-handling procedures