

Certified Healthcare Leader (CHL) Exam Content Outline

Revised August 2025; Updated January 2026



The CHL Exam Content Outline was created through the 2024-2025 job task analysis and outlines the specific areas of knowledge necessary to perform the duties of an Healthcare Leader. The Content Outline also details the percentage weight for each of the four sections which comprise the CHL Exam. The higher the percentage weight, the more heavily the questions in that area will affect your overall test score.

SECTION 1: **PLANNING AND DECISION MAKING** (PERCENTAGE WEIGHT 25%)

I. **DESIGN QUALITY CONTROL PROCESSES**

- A. Current Sterile Processing techniques, technologies, standards, and regulations (e.g., tracking systems, artificial intelligence [AI], Association for the Advancement in Medical Instrumentation [AAMI] standards)
- B. Outsourcing, standardization, and restructuring (e.g., off-site or multi-site reprocessing, vendor or third-party outsourcing)
- C. Surgical instrumentation, reprocessing equipment, and devices (e.g., case carts, robotics, complex sets, durable medical equipment, loaner instruments)
- D. Non-surgical equipment and devices (e.g., endoscopy, ultrasound, loaner equipment, clinic areas)
- E. Contractual obligations related to supplies and instrumentation (e.g., vendor relations, surgical instrument repair, soft goods, supply shortages and backorders)

II. **MANAGE WORKPLACE AND EQUIPMENT**

- A. Workflow processes and design in compliance with standards and regulations (e.g., cross-contamination, ergonomic workflows)
- B. Updated practices in instrument and equipment processing (e.g., advanced washers, robotics, flexible endoscopes, inspection devices, sterilization technology)
- C. Processing equipment lifespan and Instructions for Use (IFU) compliance (e.g., cycle count, preventive maintenance [PM], end-of-life replacement, autoclave cleaning)
- D. Facility, utility, and safety requirements (e.g., water management, HVAC, environment of care)

III. **DEVELOP WORKPLACE SAFETY**

- A. Tools for monitoring and evaluating workplace safety (e.g., ergonomic assessments, incident reporting, personal protective equipment [PPE] audits, safety data sheets [SDS])
- B. Standards and principles of workplace safety (e.g., Occupational Safety and Health Administration [OSHA] hazard assessments, workplace violence training, fire safety)
- C. Components of internal and external emergency / disaster plans (e.g., downtime procedures, mass casualty, active shooter, shelter-in-place or evacuation strategies)

IV. **CULTIVATE WORKFORCE DEVELOPMENT**

- A. Processes for staff recruitment and HR practices (e.g., union considerations, policies and procedures for staff coverage, disciplinary procedures)
- B. Processes for staff development, retention, and engagement (e.g., career advancement, orientation and onboarding, mentorship programs, competencies)
- C. Technology and tools for workforce planning (e.g., management operating systems, productivity dashboards, timekeeping system)

V. **DEVELOP FINANCIAL PLANNING**

- A. Financial planning, resources, and opportunities (e.g., capacity planning, contract staff, capital and operational budgeting, cost per unit of service)
- B. Forecasting tools, technologies, and processes (e.g., automation, inventory analysis, predictive modeling, staff productivity)
- C. Cost accounting principles (e.g., return on investment [ROI], in-house vs off-site processing, contract negotiations, depreciation, emerging technology/ innovation)

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VI. DESIGN QUALITY MANAGEMENT AND PROCESS IMPROVEMENT SYSTEMS

- A. Assessment tools to prepare risk management plans (e.g., Failure Mode and Effect Analysis [FMEA], Root Cause Analysis [RCA])
- B. Workplace hazards (e.g., chemical exposure, blood-borne pathogens, ergonomics, hazardous drug exposure, hazard identification checklists)
- C. Infection prevention practices (e.g., industry guidelines, traffic flow in restricted areas, handwashing, personal protective equipment [PPE], complete reprocessing cycle)
- D. Cross-functional teams and customer needs (e.g., Plan Do Check Act [PDCA], shared governance, multidisciplinary collaboration, feedback surveys)

SECTION 2: ORGANIZING (PERCENTAGE WEIGHT 23%)

I. ADMINISTER STAFF MANAGEMENT

- A. Skills, tools, and resources required by staff (e.g., job aids, training, communication platforms, defined job descriptions, standard operating procedures [SOP])
- B. Staffing model (e.g., organizational structure, volume, operational hours, processing time, capacity-based analysis)
- C. Customer service and relationships (e.g., service line agreements, escalation pathways, communication with internal / external stakeholders)

II. OVERSEE WORKPLACE ENVIRONMENT AND PROCESSES

- A. Design considerations, standards, and regulations (e.g., Association for the Advancement of Medical Instrumentation [AAMI], infection control compliance)
- B. Resources to maximize efficiency (e.g., LEAN for tray storage, visual boards, standardized instrument labeling)
- C. Instructions for Use (IFU) and regulatory standards (e.g., reconcile conflicting manufacturer's IFU, engage risk management for ambiguous instructions, ensure staff compliance)
- D. Key components in policies and procedures (e.g., standards, regulations, best practices)

III. DRIVE PROCESS IMPROVEMENT

- A. Voluntary / regulatory requirements, best practices, and expectations of accreditation agencies (e.g., defect rates, internal mock surveys, audits)
- B. Process improvement techniques and strategies (e.g., LEAN Six Sigma, cause-and-effect analysis, process flow, value stream mapping, survey readiness)

SECTION 3: LEADING (PERCENTAGE WEIGHT 29%)

I. LEAD AND SUPPORT STAFF

- A. Orientation and onboarding process (e.g., preceptor, post-orientation check-ins, bridge knowledge gaps, initial competencies)
- B. Employee engagement activities (e.g., recognition, awards, satisfaction surveys, daily huddles, change management)
- C. Conflict management (e.g., mediation techniques, crucial conversations, problem-solving, team building)
- D. Ethics, behavioral expectations, and relationship building (e.g., multi-generational approaches, team norms, code of conduct)

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II. MENTOR AND TRAIN STAFF

- A. Staff development and education methods (e.g., return demonstration, learning theories / styles, training modules)
- B. Mentoring and precepting skills (e.g., formalized training programs, identify future preceptors, differences between mentoring and precepting, succession planning)
- C. Frequency and methods for competency assessment (e.g., skill evaluations, annual recertification, peer feedback, structured checklists, ongoing competency)
- D. Equipment functionalities, troubleshooting, and resources (e.g., repair resource, adjust cycle parameters, calibrate equipment, common error codes)

III. PRIORITIZE COMMUNICATION

- A. Communication skills, styles, and methods (e.g., speaking, active listening, body language, negotiation, collaboration, professional language, email, internal messaging systems, communication boards)
- B. Communication challenges and barriers (e.g., languages, cultures, generational differences)
- C. Protected health information and privacy (e.g., HIPAA, social media, disposal methods)

IV. DEVELOP LEADERSHIP SKILLS

- A. Leadership and strategies for building high-functioning teams (e.g., relationship building, leadership training, diversity, inclusion, teamwork, work-life balance, modelling behavior, chain of command, time management, accountability, critical thinking)
- B. Stakeholder communication (e.g., vendor connections, interdepartmental relationships, buy-in)
- C. Meeting preparedness (e.g., agendas, huddles, cross-functional task forces, Situation-Background-Assessment-Recommendation [SBAR], cost-benefit analysis)
- D. Strategic leadership (e.g., system-wide leader, capital purchasing, renovation and construction)

SECTION 4: **GOVERNING AND COMPLIANCE** (PERCENTAGE WEIGHT 23%)

I. **MANAGE INVENTORY**

- A. Inventory control and management (e.g., automated and manual tracking, system integration, par-level optimization, substitutions, product expiration, supply comptability)
- B. Repair programs and recalls (e.g., robotic arms, loaners, preventive maintenance [PM], vendor vs. third-party repair, manufacturer recalls)

II. **OVERSEE FINANCIAL MANAGEMENT**

- A. Financial management practices (e.g., expense budget variance, capital request, reconcile expenses vs. budget)
- B. Principles of sustainability (e.g., cost saving initiatives, re-usable vs. single-use products, chemical usage)

III. **PROMOTE INFECTION PREVENTION**

- A. Guidelines, facility policies, and procedures (e.g., sentinel event, Association for the Advancement of Medical Instrumentation [AAMI], Association of periOperative Registered Nurses [AORN], Occupational Safety and Health Administration [OSHA], Centers for Disease Control and Prevention [CDC], Food and Drug Administration [FDA], Society of Gastroenterology Nurses and Associates [SGNA])
- B. Infection prevention practices (e.g., break the chain of infection, cross-contamination, traffic control, handwashing audits, sterile processing tracer activity)
- C. Special considerations (e.g., toxic anterior segment syndrome [TASS], prions, water management, Carbapenem-resistant Enterobacterales [CRE], and other high-concern microorganisms)

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IV. MAINTAIN QUALITY MANAGEMENT AND PROCESS IMPROVEMENT

- A. Quality management system, control practices and tools to meet expectations (e.g., performance indicators, dashboards, scorecards, recalls, mock surveys, tracers, turnover time, tray defects, data analytics, emerging technology)
- B. Components of risk assessment (e.g., defect vs. error, near-miss vs. negligence vs. incompetence, systemic vs. individual errors)
- C. Event reporting (e.g., incident reporting portal, sentinel events, Manufacturer and User Facility Device Experience [MAUDE])
- D. Performance improvement and risk management (e.g., strengths, weaknesses, opportunities, and threats [SWOT], root cause analysis [RCA], plan, do, check, act [PDCA])
- E. Standards and principles of workplace safety (e.g., Occupational Safety and Health Administration [OSHA] hazards assessment, eyewash station, personal protective equipment [PPE] compliance)
- F. Record management (e.g., accreditation requirements, record retention, audits, state and local)