

# **Oregon HFMA Support for HFMA's New National Certification Program: Introducing Professional Practicum Micro-Case Coaching Sessions**

**February 24, 2011**

## Background

In January 2011, HFMA replaced the old certification examinations, consisting of a 4-hour core exam and four 2-hour specialty exams, with a single, comprehensive certification exam designed for mid-level healthcare finance professionals with a minimum of 3 to 5 years of management experience. The new 4-hour exam tests candidates in management-level issues in healthcare finance in six knowledge areas that together comprise the Healthcare Finance Core Curriculum:

- Revenue cycle (21-25% of the exam)
- Disbursements (4-8%)
- Budgeting and Forecasting (18-22%)
- Internal Controls (15-19%)
- Financial Reporting (16-20%)
- Contract Management (13-17%)

The new Healthcare Finance Core Curriculum is broader than the body of knowledge on which the old core exam was based and covers topics in greater depth. To the extent that the new exam's 150 questions weren't specifically written for the new exam, they probably come from HFMA's inventory of questions from the five old exams (the old core, the PFS specialty, the accounting & finance specialty, and—to a lesser extent—the managed care and physician practice management specialty exams). This may mean that topics discussed in the old core at a fairly high level could be tested on the new exam in greater detail.

HFMA no longer provides certification preparation materials in printed form. The new study guide is an on-line, interactive "eLearning" course accessed through the HFMA website, beautifully illustrated and employing a variety of modern techniques to convey its content. The on-line study guide, which Oregon HFMA purchases at a discounted price of \$156 per license from National HFMS, replaces the chapter's "lending library" of study guides that members could borrow. The chapter's Certification Chair issues sign-ons to all Oregon HFMA members who desire to become certified and submit a study plan. A document containing a model study plan and explaining the chapter's expectations of members wanting to become certified is located in the "Chapter Information" section of the chapter's website at [www.oregonhfma.org](http://www.oregonhfma.org). The website also contains a downloadable PowerPoint presentation with sample eLearning screens and a more detailed explanation of the new certification process.

Preparation for the exam takes about 12 to 15 hours of concentrated study, although it may take some candidates longer. The seven on-line modules of the self-study course (the revenue cycle material consists of 2) consist of approximately 1,000 screens. Each module can be repeated as often as the learner wants. After completing all 7 modules and passing a 50-question sample test (passing score is 70%), candidates earn 10 hours of CPE. Anyone interested in exploring certification can also take the sample test free of charge.

## The Professional Practicum

HFMA has developed a new coaching course for chapters wishing to help their members prepare for the exam. The coaching course materials are available at no cost in the Chapter Leaders Only section of the HFMA website and are called the Professional Practicum. The Professional Practicum consists of 35 “micro”-case studies that ask participants, under the guidance of a volunteer facilitator, to solve common financial management issues and problems in small groups, such as preparing a short presentation explaining how the annual budgeting process works to a group of clinical department managers with limited understanding of finance, or meeting with ED nurses and physicians to explain the need to collect insurance information from patients in an EMTALA-compliant way. The micro cases support the on-line content of the self-study course and add depth of understanding to the concepts presented there. Since each micro case takes about 1 to 1 ¼ hours to complete (lecture, small group discussion, presentation of results to the full group, and Q&A), chapters are likely to use only a selection of them.

The concept of micro-cases taught in small group settings is new to HFMA’s certification program. The previous chapter coaching course provided by HFMA consisted of PowerPoint decks that shoveled technical content at participants. While Oregon HFMA coaching courses didn’t use these materials, our method of teaching was similar, throwing massive amounts of material at a generally passive audience.

HFMA recommends using the micro-cases in a live group setting. A good micro-case discussion simulates a manager huddle in which an impromptu solution to an operational issue is developed. On the positive side, they can lead to new awareness, knowledge, skills, and attitudes that lead to an increased ability to solve problems on the job. On the downside, they take a lot of time, including the time to travel to the coaching course meeting site. There is also no guarantee that the time members invest in solving micro-cases increases their likelihood of passing the exam. This will depend on how closely HFMA aligns exam questions with the micro-cases and how well chapter volunteers present them.

The Oregon chapter will experiment with different ways to employ micro-cases, beginning with the simplest solution first: conference calls in which a group gets together by phone to brainstorm and solve the micro-cases. For added efficiency we will limit the micro-cases to those with the greatest potential to help members prepare for the certification exam. Micro-cases will initially cover topics candidates tend to have the greatest difficulties with, such as ratio calculations, variance calculations, break-even problems, cost reports, cash budget problems, and accounting questions.

Once candidates are ready to take the certification exam, they can register for the exam through the HFMA website and pay for it by credit card. Oregon HFMA reimburses members for the full cost (\$395) of the exam. The chapter’s expense reimbursement form can be downloaded from Oregon HFMA’s website as well. The exam is given in five Oregon cities through Castle Worldwide, an on-line testing firm. Castle’s Portland testing site is on the campus of Portland State University. Candidates are allowed to bring their calculator.

## Oregon HFMA’s New Approach to Supporting Certification

1. Set an annual goal for the number of chapter members who become certified and include the cost in the budget (our goal for the 2010-11 fiscal year, which ends on April 30, is 52; the current count is 46).

2. Present an introductory session on certification at a quarterly chapter meeting once a year (we just did this at the winter meeting in February).
3. Publish an article about certification in each issue of the chapter newsletter so members know how to access the chapter's certification resources.
4. Give members who submit a study plan access to the on-line self-study course.
5. Invite them to 2 – 3 conference calls to work on Professional Practicum micro-cases.
6. Email micro-case materials to participants ahead of time.
7. Convene conference calls and solve the Professional Practicum micro-cases as a single group or, if the size of the group is too large, divide the group into smaller teams.
8. If the group breaks into smaller teams, use multiple conference call lines for members to work together on solutions, with groups emailing each other their solutions before coming together again in a single conference call to present their solutions.
9. Ask members studying for the certification exam to record their actual study time and report their progress to the certification chair on a regular basis via phone or email. The intent is not to bug members or micro-manage their study efforts but to show interest and support.
10. Ask members to re-send their study plans to the certification chair at the conclusion of their studies to discuss their preparation experience and allow us to measure actual study effort against plan. We ask members to do this before they register to take the exam.
11. Reimburse members for the cost of the exam.
12. Track the number of new members with "CHFP" behind their names and report in the chapter newsletter.
13. Formally recognize all newly certified members at the chapter's annual meeting.

#### First Round of Professional Practicum Conference Calls

Friday, March 11, 2011, 11:30 – 1:00: Conference Call #1

Topics: Ratios and variances

Friday, March 18, 2011, 11:30 – 1:00: Conference Call #2

Topics: Breakeven analysis, cash budgets, cost reporting and accounting

Friday, March 25, 2011, 11:30 – 1:00: Conference Call #3

Topics: General review of the Healthcare Finance Core Curriculum

Materials for the conference calls, including the call-in numbers and participant codes, will be emailed to participants on the Monday before each call.

Questions?

For assistance with logins to the on-line self-study course, please contact Sara Nofziger at (503) 657-8663 Ext. 100 or sara@absportland.com.

For assistance with the Healthcare Finance Core Curriculum or the Professional Practicum conference calls, please contact Christoph Stauder at (503) 789-3885 or christophstauder@msn.com.