



hfma certification

Healthcare Financial Management Association

## **HFMA Certification**

# **Program & Policies Handbook**

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## HFMA Certification Program & Policies Handbook

Information in this Handbook represents current policies and procedures for the HFMA certification programs – CRCR, CHFP and FHFMA. Information in this Handbook supercedes information contained in any previously published information.

All candidates are accountable for information included in the handbook and abiding by the designated policies. HFMA and the HFMA Board of Examiners (the BoE), will review any reported or suspected breach of policy. The HFMA Board of Examiners (BoE) and HFMA reserve the right to change these polices.

### ***Certification Program Contact Information:***

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# HFMA Certification Program & Policies Handbook

## I. HFMA Certification Program: Purpose & Governance

### Mission

HFMA's certification program mission:

"HFMA certification validates the unique and specific financial management competencies of healthcare financial, professional staff and managers, shows that certified individuals demonstrate those competencies, and thereby supports the career advancement of certified individuals."

### CHFP Program Purpose

Through experience and analysis HFMA believes there are strong linkages between certification, an individual's professional development, and sustainable organizational performance. To forge these linkages, HFMA's certification program will:

- Define the knowledge bases and skills necessary to perform healthcare financial management roles competently
- Develop and maintain a competency framework integrating the defined knowledge areas and skills that may be used for planning, developing, structuring and integrating all HFMA professional resources
- Promote nationally recognized industry standards for financial management
- Identify and recognize those qualified to be the next generation of financial executive leaders
- Enhance career growth for healthcare finance professionals

### CRCR Program Purpose

Certified Revenue Cycle Representative (CRCR) program helps set performance standards for revenue cycle staff. The CRCR certification:

- Deepens understanding of revenue cycle operations in an evolving value-based payment environment
- Verifies professional competence and currency
- Enhances career growth opportunities

Those earning the CRCR designation:

- Demonstrate a commitment to professional growth
- Achieve a recognized professional certification and designation by the leading healthcare finance professional association

### Governance

HFMA's Board of Examiners (BoE) exists to fulfill the following responsibilities related to HFMA's certification program:

- The Certification Process. The BoE is responsible for the definition and development of the technical body of knowledge that the certification process examines. It is also the body that evaluates requests from individuals for variances from or interpretations of the stated policies and procedures.

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- Certification Maintenance. The BoE is responsible for ensuring that the certification maintenance requirements and processes are both appropriate and effective. The BoE also evaluates variance requests from HFMA certified members and professionals in this area.
- Examination Scoring. The BoE works with an independent psychometrician specializing in tests and measurements to set and monitor the pass points for the certification examinations and overall exam performance.

### Requirements for HFMA Certifications

#### **Certified Revenue Cycle Representative (CRCR)**

The BoE has approved the following requirements for certification as a Certified Revenue Cycle Representative (CRCR):

- The candidate must successfully complete the CRCR certification exam

The ideal candidate is a revenue cycle professional with direct experience in healthcare provider revenue cycle operations. CRCR is designed for healthcare revenue cycle staff and associated departments. This includes, but is not limited to:

- Patient Access
- Financial Representatives
- Patient Accounts
- Health Information Management
- Case Management
- Finance
- Compliance
- Managed Care Operations
- Decision Support

#### **Certified Healthcare Finance Professional (CHFP)**

The BoE has approved the following requirements for certification as a Certified Healthcare Finance Professional (CHFP).

- A CHFP candidate must have regular or advanced membership in HFMA.
- A candidate must successfully complete the CHFP certification exam.

The ideal candidate for certification is at least mid-management (or aspiring executive) level finance professional in a healthcare provider setting or a senior accountant or analyst with at least three to five years experience.

#### **Fellow of the Healthcare Financial Management Association (HFHMA)**

The requirements for Fellowship include paying the appropriate fee and submitting an application attesting to the following:

- The Fellowship candidate must be certified as a CHFP. If all requirements are met, a candidate can apply concurrently for the CHFP and Fellow designation

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although the Fellow designation will be awarded the month following the CHFP designation being awarded.

- The candidate must have at least five (5) years total (not necessarily consecutive) membership in HFMA and be an active current member.
- Education requirement: Minimum of a B.A. degree or 120 semester hours from an accredited college or university. The Board of Examiners has determined that “accredited” programs be defined to mean programs offered by schools and universities that are accredited by agencies recognized by the US Department of Education (DoE) and/or the Council for Higher Education Accreditation (CHEA).
- There are three options related specifically to volunteer activity in HFMA and/or the industry. To meet this requirement, a Fellowship candidate may complete one of the following activities:
  - 1) Have earned the Follmer Bronze award
  - 2) Volunteer in the chapter. Fulfillment of the service requirement would be determined as follows: Using the current Founders Points criteria, earn a minimum of two points per year in two consecutive years. These activities must have been completed within three years prior to submitting the FHFMA application. A list of eligible activities is posted on HFMA’s website in the certification area.
  - 3) Volunteer service for two years in a healthcare industry capacity such as: a state hospital association committee or task force; a local, state or federal government healthcare committee or task force; a professional association (e.g. ACHE, MGMA, etc.) committee or task force. These activities must have been completed within three years prior to submitting the FHFMA application

## II. Certification Examinations

### CRCR Exam

All healthcare revenue cycle staff and associated departments staff are eligible to take the CRCR certification exam. The CRCR exam tests for an integrated understanding of revenue cycle business operations. HFMA membership is not required to hold the CRCR designation.

The CRCR certification exam contains 150 multiple choice questions across nine content domains: patient access, financial representation, patient accounts, health information management, case management, finance, compliance, managed care operations and decision support.

### CHFP Exam

The CHFP HFMA certification exam tests for an advanced professional knowledge and technical skills in healthcare financial management.

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HFMA membership is required to hold the CHFP designation. *Student membership does not count.*

The CHFP certification exam contains 150 multiple-choice questions across six content domains: revenue cycle operations, disbursements, budgeting & forecasting, internal controls, financial reporting and contract management. The weighting of content areas (i.e., the percentage of total items covering a chapter/content area) is defined within the current bodies of knowledge.

The exam is designed to assess how well a candidate can do the following:

- Apply knowledge to specific situations using judgment and logical reasoning
- Develop reasonable conclusions
- Evaluate data in a complex situation
- Apply appropriate concepts and procedures to given situations

HFMA – An exam is not required to reach this level of certification.

### HFMA Certification Program Study Materials

The BoE is responsible for the development of appropriate study materials that assist candidates in preparing for the certification examinations. In developing the self-study materials, the BoE defines the body of knowledge through a formal role-delineation/field study process.

The BoE enlists recognized industry experts to author the examination preparation materials according to the role delineation study findings. The BoE serves as reviewers of the certification preparation materials and authorizes release of the materials for use by candidates.

The Certification Examination Preparation Courses (available online for purchase for CRCR and CHFP) are materials the candidate completes independently to prepare for the HFMA certification exams. These professional staff and mid-management level courses examine contemporary healthcare financial management practice. The certification exams assess a candidate's comprehension of these contemporary industry practices and problem solving ability. Candidates are not required however to complete the preparation course to take the certification exams.

Please note: These online e-learning courses do not have any downloadable or printable features. Hard copy materials for both online e-learning courses are NOT available. However, there is a supplement to the Core Curriculum and CRCR study guide that can be downloaded from within the course; a "Key Concepts Guide". The concept guide will serve as both a certification test preparation and a job-aid. This is a great tool to assist with the online learning approach.

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### Administration of the Certification Examinations

The CRCR and CHFP certification exams are conducted via the Internet. The CRCR exam is available through HFMA's website and through select technology partners. The CHFP exam is administered by Castle World Wide.

#### **The CRCR Examination**

The maximum time allowed for the CRCR candidate to complete the certification exam is three (3) hours. CHFP candidates are allowed four (4) hours to complete the CHFP exam. To become certified, a candidate must successfully complete the certification exam (CRCR or CHFP). There is no requirement for a proctor for the CRCR examination. CRCR candidates are required to accept the terms of the HFMA confidentiality policy.

#### **The CHFP Examination**

A proctor will be required for CHFP. There are two options for the CHFP examination.

**Option 1 - Castle Worldwide Proctored Test Centers** -Castle Worldwide sites are open for testing Monday through Saturday during normal business hours. Exam candidates may select a date and time based on site availability during exam scheduling.

#### **Option 2 - Live Online Proctored (LOP) Test Administration**

LOP offers secure, live, internet-based test administration for CHFP exam candidates. Through the Castle Worldwide online test scheduling system, a candidate may elect to test via a live, online-proctored testing session. Both domestic and international candidates may select live, online-proctoring. See Appendix II.A (Pages 13-14).

Note: Activities that compromise the HFMA Certification exams and/or testing process may result in actions against the candidate including but not limited to being barred from taking any HFMA certification exam and/or applying for certification, removal of designation if already certified, removal of membership in HFMA, and legal action.

### Scheduling the Certification Examination

#### **The CRCR Examination**

The CRCR examination is provided via Internet. Individuals seeking to obtain the certification may access the self-study materials and CRCR exam through HFMA's website. CRCR candidates must wait 30-days between testing attempt.

#### **The CHFP Examination**

To take the HFMA CHFP certification exam, advance arrangements must be made and a completed online application with non-refundable payment submitted.

Certification exam registration is available through HFMA's website. Registration processing and testing administration is provided to HFMA by Castle Worldwide. To retake the examination: Castle will enforce a 90-day waiting period between testing



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attempts (i.e., you will not be permitted to select a testing session that is less than 90 days following your last testing attempt).

### Examination Confidentiality

All candidates are required to accept the terms of the HFMA confidentiality policy that they will not divulge the nature or content of HFMA examinations test items, engage in unauthorized communication during the examination, refer to unauthorized materials or use unauthorized equipment during the exams. A confidentiality statement is included in the exam application process and in the instructions to the candidate that accompanies the certification examinations. Acceptance of the confidentiality statement is required to launch the examination. Candidates refusing to accept the confidentiality statement will not be allowed to schedule certification examinations.

### Examinations for Individuals with Disabilities

In accordance with the American with Disabilities Act (ADA), the BoE will allow reasonable modification of test administration processes in circumstances where a determination has been made that a candidate's disabilities require departure from established testing protocol and where the accommodation will not affect test validity and reliability. A written request, including appropriate written medical verification of the disability and stipulated accommodations for the disability must be submitted to HFMA National prior to scheduling an examination. Requests will be handled on a case-by-case basis.

### Examination Security

The BoE, with due consideration of ethical and legal requirements associated with certification testing, will take steps it deems necessary to assure that only individuals with a legitimate need for access to test materials are able to obtain such access. Access to an individual candidate's exam performance is never, under any circumstances, provided to the members of the BoE, chapter leaders or anyone requesting such information.

### Reporting Scores

Information concerning CRCR and CHFP candidates and examination results are strictly confidential.

CHFP certification candidates are informed in the examination instructions that their local chapters will be notified of the number of candidates who successfully complete the CHFP examination. For Davis Chapter Management System (DCMS) reporting, the total number of exams taken and passed will be disclosed.

Disclosing who failed an exam would be a breach of the confidentiality policy\*. No report of examination failures is made at anytime. Neither names nor any other information will be made available. Anonymous assessment results, reported in an aggregate form, may be reported to and used by the BoE and its consulting

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psychometrician(s) for the purposes of monitoring the overall performance of the certification program.

*Note: \*Regarding confidentiality, HFMA follows the Standards for Educational and Psychological Testing, standards 8.2, 8.6 and 12.11. These standards proscribe candidate and testing results confidentiality.*

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### III. Recertification – Maintenance

#### Requirements for Certification Maintenance

The HFMA Board of Directors requires that individuals holding HFMA certifications complete professional educational activities to demonstrate they are maintaining their technical and professional competence.

The BoE has specified the following maintenance requirements:

#### **CRCR**

- HFMA members and non members who have earned the Certified Revenue Cycle Representative (CRCR) designation must main their certification by taking a 75-question exam every 2 years. Candidates will be allowed 90 minutes for the CRCR maintenance exam.
- The recertification exam must be completed by June 30 of the maintenance reporting year.

#### **CHFP and FHFMA**

- A certified CHFP and FHFMA member is required to accumulate a total of 60 contact hours, in eligible topic areas over a three-year period. A contact hour is defined as 50 minutes of continuous programming.
- Candidates must self report eligible activities; HFMA reserves the right to request that proof of attendance and participation in any reported educational activity be provided to validate reported hours. It is recommended that documentation for reported activities be retained for one year past the end of the maintenance reporting due date.
- Candidates are responsible for ensuring the accuracy and completeness of their records. Candidates with deficiencies will be required to eliminate that deficiency within 3 months (i.e., by September 1 of the year in which maintenance is due) to maintain the designation. Failure to do so will result in loss of the designation.
- Candidates are responsible for completing and maintaining their certification record online through the HFMA website.
- Eligible programs and professional activities that may be used for maintenance are listed on HFMA's certification area of the website.
- HFMA membership should be current to retain the designation.

#### Failure to Maintain Certification

#### CHFP and FHFMA

The BoE requires that a member's failure to complete the above maintenance requirements by May 31 of the maintenance reporting year will result in removal of the certification designation by October 31 of the year that maintenance was required.

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- Once a designation has been removed, the BoE allows affected members a three-month grace period (to September 1) during which the designation can be regained updating the on-line education record to show that the 60-contact hour education requirement has been met fully and/or reinstate membership.
- After the three-month grace period has expired without the certified member meeting the certification maintenance requirements, the member must retake the CHFP certification examination, and meet all other requirements to be reinstated as a CHFP or Fellow.

### CRCR

The BoE requires that a member's failure to complete the recertification exam by June 30 of the maintenance reporting year will result in removal of the CRCR certification designation.

- To be reinstated as a certified CRCR (once a designation has been removed) candidates would need to take the CRCR certification exam over again.

Please direct any questions to: [careerservices@hfma.org](mailto:careerservices@hfma.org).

### Appendix II.A

#### Live Online Proctoring Instructions (CHFP Examination)

##### Scheduling a Live, Online Proctored Testing Session

Through Castle's online test scheduling system, a candidate may elect to test via a live, online-proctored testing session. Both domestic and international candidates may select live, online-proctoring. Candidates are responsible for ensuring their testing environment meets the minimum requirements to take the examination.

##### Requirements

During the scheduling process or at any time prior to the scheduled testing session, candidates may perform a system check of the computer they intend to use during the testing session. The student is required to have a webcam installed on their exam workstation and reliable access to the Internet. An internet connection disruption will suspend the test session. The following are minimum technical requirements:

- A well-working computer with 1 GB of RAM or higher
- A high-speed internet connection (3MBps). Wireless is acceptable; however a wired-connection is preferred
- A webcam with 640×480 video pixel resolution (a laptop camera is acceptable)
- Working speakers connected to the computer
- A microphone connected to the computer (consider a webcam with a built-in microphone)
- Flash player version 7 or higher
- Browser compatibility: IE, Firefox, Chrome, Safari

If the candidate is unable to take the examination at the scheduled session due to inadequate system capabilities, the candidate will be required to reschedule the session. Once the candidate has scheduled the testing session using the online scheduling system, Castle will email the candidate a confirmation notice which will provide the following information:

- The date and time of the testing appointment;
- The URL for the scheduled, online-proctored examination;
- The URL for the system check;
- Computer specifications required to take the examination via live, online-proctored testing;
- A list of items that candidates may and may not have access to during the testing session; and
- Information regarding an online tutorial for candidates, so that candidates may familiarize themselves with Castle's Internet-based test delivery system prior to the scheduled test date. Candidates may access the online demonstration free of charge through Castle's website.

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### Live, Online Proctoring Procedures

On the date and time of the candidate's scheduled testing session, the candidate will access the URL address provided (click on the link provided by email) and enter a live remote proctoring website which is specific to the individual candidate's examination for the designated date and time. A proctor connects to the candidate's computer and confirms the system requirements. The proctor verifies the identity of the candidate by asking the candidate to hold his/her photo ID up to the webcam. The proctor then records (and retains) a snapshot of the candidate's photo ID. The proctor instructs the candidate to use his/her webcam to provide a full view of the testing room to ensure that prohibited materials (or individuals) are not available to the candidate.

When the proctor has completed the necessary steps to ensure monitoring, the candidate will be given access to the examination. The examination is delivered through Castle's secure Internet-based testing system.

During the testing session, the candidate may communicate with the proctor via email and chat features available within the site.

- The proctor will have complete access to the candidate's computer to ensure that the candidate does not have unauthorized applications running, multiple monitors open, or someone else taking the examination remotely.
- The proctor will monitor the candidate through the webcam, and the video and audio of the testing session will be recorded and retained for a period of 15 days following the testing session.
- The proctors are highly trained at detecting and addressing aberrant behavior, as well as proffering technical troubleshooting if required.
- At any time, the proctor can view the candidate's desktop and the computer's system activities, and the proctor can terminate the testing session for integrity reasons.

Contact the Castle Worldwide main support desk with any scheduling or technical questions at (919) 572-6880. All other questions email [careerservices@hfma.org](mailto:careerservices@hfma.org).