

**Healthcare Financial Management Association**

# **Certification and Fellowship Programs**

*Revised January 2007*

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Revised January 2007

Information in this brochure represents current policies and procedures about the HFMA Certification program and supercedes information contained in any prior versions of this brochure or previously published Web pages from the hfma.org web site. The HFMA Board of Examiners reserves the right to change the polices and procedures as described in this publication.

***Certification Program Contact Information:***

The Healthcare Financial Management Association  
Attn: Career Services  
Two Westbrook Corporate Center, Suite 700  
Westchester, IL 60154

Web site: [www.hfma.org/certification](http://www.hfma.org/certification).

e-mail: [certification@hfma.org](mailto:certification@hfma.org)

Phone: (800) 252-4362, ask for certification

Fax: (708) 531-0665 (to submit credit card payment for self-study materials and certification exam applications)

*HFMA does not discriminate in any of its activities on the basis of age, sex, race, religion, national origin, disability, or marital status.*

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## ***HFMA Certification Requirements***

*Revised October 2006*

- Two years total as a regular HFMA member
- Two years of professional experience in the healthcare finance industry
- 60 semester hours of college coursework from an accredited institution or 60 professional development hours
- Successful completion of the HFMA Core certification exam
- Successful completion of one HFMA specialty certification exam\*
- References from a current elected chapter officer and your CEO or supervisor
- Submit conforming application with one-time fee within 24 months of successfully completing first exam

\*Note: Exams may be taken at any time after you become an HFMA member, and include Accounting and Finance, Financial Management of Physician Practices, Managed Care, and Patient Financial Services



### **Become a Certified Healthcare Financial Professional (CHFP)**

Status must be maintained every three years by earning 90 contact hours



- Five years total as a regular or advanced HFMA member
- Bachelor degree or 120 semester hours from an accredited college or university
- Reference from an HFMA Fellow or current elected chapter officer
- Volunteer activity in healthcare finance within three years prior to applying for FHFMA, including **one** of the following:
  - Earn the Follmer Bronze Award
  - Volunteer in the chapter and earn two Founders points (under the current system) for two consecutive years
  - Volunteer service for two years in a healthcare industry organization within the past three years
- Submit conforming application with one-time fee



### **Achieve Fellowship Status (FHFMA)**

Status must be maintained every three years by earning 90 contact hours



The Certified Healthcare Financial Professional (CHFP) designation is earned by successfully completing HFMA's certification program. This is the first step in achieving the designation of Fellow of the Healthcare Financial Management Association (FHFMA).

The certification program is designed to prepare individuals for increasingly responsible positions in the healthcare finance industry. Being HFMA certified indicates that certified members have a demonstrated comprehensive understanding and proficiency of HFMA's defined body of knowledge in healthcare financial management overall and in the specialty areas.

## **HFMA Certification Exam Content**

Successful completion of the HFMA Core exam and one of the specialty exams is one of the requirements to earn the CHFP designation. All HFMA members are eligible to take the certification exams. The exams are designed to assess how well the 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.

The HFMA Board of Examiners (BOE) is responsible for bi-annually defining the certification content domains that comprise the certification program body of knowledge and updating the content of the self-study materials and corresponding exams to reflect changing conditions in healthcare financial management in the United States.

The certification self-study courses and corresponding exams cover the topics listed in the table on the following page. The 2007-2008 exams and courses expire on December 31, 2008. The Core exam contains 166 multiple-choice questions and the specialty exams each contain 83 questions. The weighting of content areas (i.e., the percentage of total items covering a chapter/content area) is defined in the following table.

## **Preparing to Take the Certification Examinations**

The following strategies could be used to prepare for the exams.

- Acquire professional experience in the areas covered on the exam.
- Plan adequate time to review content areas covered on the exam.
- Schedule time to complete the self-study course and allow adequate time to complete all practice and review exercises in those courses.
- Attend the National Coaching Course offered at ANI or locally by a chapter.
- Complete the sample exam questions (available at [www.hfma.org](http://www.hfma.org)) to become familiar with the test format and the type of questions asked.
- Take advantage of HFMA's chapter assistance. Some HFMA chapters offer exam preparation assistance. To find out what assistance your chapter provides, contact your chapter.



## HFMA 2007-2008 Certification Exam Content

<b>Core Exam (150 questions)</b>	
5%	Healthcare Industry Overview
6%	Cost Analysis & Management
3%	Financial Analysis Techniques
6%	Accounting Concepts & Principles
5%	Auditing and Internal Control
3%	Capital Planning & Financing
6%	Budgeting
6%	Strategic Planning
3%	Investments & Cash Management
6%	Information Systems
6%	Patient Financial Services/Revenue Cycle
6%	Corporate Compliance
6%	Managed Care
6%	Regulatory Environment
5%	Health Information Mgmt. & Case Mgmt
3%	Quality & Patient Safety
3%	Management Skills
3%	Human Resources Management
5%	Legal Aspects
6%	Physician Practice
2%	HFMA Overview

<b>Patient Financial Services Specialty Exam (75 Questions)</b>	
4%	Organizational Forecasting
15%	Accounts Receivable Management
4%	Financial Analysis Techniques
9%	Information Technology
12%	Policy, Planning, & Evaluation
13%	Access Management
13%	Claims Processing
11%	Managed Care
11%	Legal Aspects
4%	Physician Entities
4%	Other Related Entities

<b>Accounting and Finance Specialty Exam (75 Questions)</b>	
12%	Cost Analysis & Management
15%	Financial Planning & Budgeting
15%	Capital Planning & Financing
10%	Investments & Cash Management
10%	Internal Control
15%	Financial Reporting, Accounting Principles & Auditing
15%	Regulatory Environment & Corporate Compliance
8%	Employee Benefits, Insurance, & Risk Mgmt.

<b>Physician Practice Management Specialty Exam (75 Questions)</b>	
10%	Physician Coding & Payment Systems
10%	Encounter Processing
16%	Accounts Receivable: Collection, Policy & Evaluation
8%	Information Systems
10%	Budgeting & Benchmarking
6%	Cost Analysis & Management
14%	Physician Compensation & Leadership
8%	Contracting, Negotiating, Reimbursement Methodologies
4%	Insurance & Risk Management
7%	Legal and Regulatory
7%	Other Management Issues

<b>Managed Care Specialty Exam (75 Questions)</b>	
5%	Overview of Managed Care
10%	The Healthcare Delivery System
35%	Financial Management
15%	Managed Care Operations
10%	Contracting and Negotiating
5%	Medical Management
5%	Regulation and Accreditation
5%	Forces Driving State & Federal Health Policy
10%	Medicare & Medicaid

# HFMA Certification Program Study Materials

Study aids are available from HFMA National to help candidates prepare for the certification exams:

- The **Self-Study Courses** are materials the candidate completes independently to prepare for the HFMA exams. There is one course for each of the HFMA exams and each course contains a series of guided readings followed by review activities. These intermediate-level courses assume the candidate has baseline knowledge of the materials covered.

Questions on the certification exams are based solely on the material covered in these courses, although it is not required that a candidate complete the course prior to taking an exam. The self-study courses and exam questions are copyrighted by HFMA National and may not be duplicated in any form, including photocopies, scanned electronic files or audiotape. HFMA membership is not required to purchase the self-study courses. There are no prerequisites or prework required.

For a description of each of the courses or to order the courses, refer to [hfma.org](http://hfma.org). An order form is also included at the end of this brochure. These books expire on the date printed on the book.

- **HFMA-Sponsored Coaching Course** is available at ANI (Annual National Institute) for each of the exams. These group live sessions can serve as an introductory overview or preview of the materials covered in the course or as a summary/review for candidates who have already completed the self-study course. There are no pre-requisites or pre-work required for completing the course. To register, refer to the HFMA website at [hfma.org](http://hfma.org).
- **Chapter Assistance.** Some HFMA chapters offer exam preparation assistance including chapter-sponsored coaching courses.

## **CPE Credit for Self Study Courses**

The number of credits awarded is determined by the average completion time of individuals representative of the target audience who completed the intermediate level course. For a person to receive CPE credit, the course must be completed and required documentation submitted to HFMA (with the minimal level of performance being met as specified in the course materials) within one year of the purchase date or prior to the expiration date of the course (as printed in the course), whichever date comes first. The candidate is advised that CPE requirements may differ by jurisdiction and candidates should consult with their reporting jurisdiction. CPE will be awarded in the field of Specialized Knowledge and Application. There are no prerequisites or prework required for this intermediate level class.

For each paid copy of the course, only one person may submit the documentation required to receive CPE (the self-assessment score log, the end-of-course test answer sheet, and the end-of-course evaluation), although multiple persons may use the materials to study and prepare for an exam. For example, the purchaser of the self-study guide may not allow someone else to copy the Administration section of the book and also submit the required forms for CPE. The person requesting CPE must be the only person doing so for that copy of the book. Original forms must be mailed as directed on the forms. Faxes will *not* be accepted.

Participants will receive a certificate of program completion reflecting the number of instructional hours earned for independently completing required activities in the 2007-2008 self-study course as follows. Processing of CPE requires 60 to 90 days. To receive CPE for the 2007-2008 courses, required documentation must be submitted prior to December 31, 2008.

- Core Program self-study course – 16.5 CPE credits
- Accounting and Finance Specialty self-study course – 15.0 CPE credits
- Patient Financial Services Specialty self-study course – 12.5 CPE credits
- Financial Management of Physician Practices Specialty self-study course – 11.5 CPE credits
- Managed Care Specialty self-study course – 12.0 CPE credits

### **National Coaching Course**

Participants receive CPE credits (in the field of Specialized Knowledge and Application) for attending the group live Core Program of specialty exam National Coaching Courses at the HFMA Annual National Institute (ANI), for which the date and location varies each year. Participants receive a certificate of completion reflecting the number of CPE hours earned, which is based on the actual length of the course. There are no prerequisites or prework required for this intermediate level class.

### **HFMA Ironclad Guarantee**

HFMA National stands behind the quality of the certification programming. If a candidate is not satisfied with the quality of the self-study materials, HFMA National will provide the candidate with a full refund. Candidates seeking a refund must provide HFMA with written comments within one month of ordering and prior to the expiration date of the materials. Refunds will not be granted past one month from the date of ordering the certification study materials. Refunds requested for reasons other than dissatisfaction with the quality of the materials will be issued only upon receipt of unopened (i.e., shrink wrap remains intact) self-study materials including the binder. In all cases, the refund will be issued to the party that paid for the order. For information regarding administrative policies such as complaint and refund, please contact HFMA directly at: HFMA, Professional Development Department – Career Services, Two Westbrook Corporate Center, Suite 700, Westchester, IL 60154, or call 800-252-4362, press 2.



**S P O N S O R S** Healthcare Financial Management Association Educational Foundation is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Web site: [www.nasba.org](http://www.nasba.org)

CPE requirements may differ by jurisdiction; therefore participants should consult their reporting jurisdiction. All HFMA National-sponsored education programs earn points toward HFMA certification maintenance requirements.

## Signing up for the Certification Exams

The HFMA certification exams are administered via the Internet and must be proctored by an HFMA certified member approved by the member's chapter and by HFMA National. Candidates must be an active HFMA member and have up to one year after registering for an exam to complete that exam. After one year has passed without the exam being completed, the candidate is required to submit a new exam application with appropriate fees. *The exam is always based on the current version of the self-study materials and available only until the expiration date of those materials as published in them.*

The Core exam and one or more specialty exams may be taken on the same day or on separate dates. One exam is not a prerequisite to any other exam; they can be taken in any order.

- The Core exam contains 166 questions, of which 150 are scored, and the candidate is allowed up to four (4) hours to complete it.
- The Specialty exams contain 83 questions on each exam, of which 75 are scored, and the candidate is allowed up to two (2) hours each to complete each exam.

## Examination Confidentiality

Candidates are required to accept all policies and procedures as stated in the Exam Candidate Handbook (available at: <http://www.hfma.org/certification/chfp/examapplication/CandidateHandbook.htm>) 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 examination. 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.

## Scheduling the Examination

To take any of the HFMA certification exams, advance arrangements must be made and a signed, completed CHFP Examination Application with non-refundable payment submitted as indicated on the application:

- HFMA confirms applicant is a current HFMA member in good standing.
- The exam candidate *must* sign the exam application and attest to their knowledge of and agreement to abide by all policies and procedures as stated in the HFMA Certification Exam Candidate Handbook available at: <http://www.hfma.org/certification/chfp/examapplication/CandidateHandbook.htm>
- The candidate is responsible for working through a local HFMA chapter to take the exam with an approved proctor. Proctors must be certified members of HFMA. Persons forbidden to serve as proctor for a candidate are family relatives of the candidate, or persons from the same organization as the candidate and holding a direct reporting or supervisory role with regards to the candidate. Approved proctors are listed online at: <http://www.hfma.org/certification/chfp/examdates/> Only HFMA members have access to this information.
- Chapters and proctors coordinate to establish test dates for the chapter. Candidates may take an exam through any chapter. As provided by the chapters, dates and locations are posted online at <http://www.hfma.org/certification/chfp/examdates/> Candidates must communicate with chapters/proctors in advance to ensure there is available space and computer workstations. Candidates may also independently locate an approved proctor and set a mutually agreeable test date and location with that proctor.
- Exam applications *must* include the name of proctor as well as the mutually agreed upon exam date. Candidates will be authorized to take the exam with that proctor *ONLY*.
- *Phone applications will not be accepted.* Applications can be submitted through the HFMA web site or faxed for charge payment. Application with check payment must be mailed and applications with charge payment can be submitted online, mailed, or faxed.

Candidates must allow ten (10) business days from the time HFMA National receives the exam application with charge payment until being authorized to take an examination and assigned a password. Fifteen (15) business days must be allowed for processing of check payment. Candidates requesting processing of an application in less than the above stated timeframes will be assessed a \$25 expedite processing fee for that application, payable prior to completing the exam. If too short of a notice is provided, HFMA reserves the right to decline processing of the application and scheduling of the exam.

After the application has been processed and approximately three (3) business days prior to the scheduled exam, the candidate and the designated proctor each will receive a unique, time-sensitive password (good for only the designated exam date) in an e-mail notification.

- HFMA National is not responsible for any errors in the date provided on the application or other information supplied by the exam candidate.
- The password notification will be sent to the candidate and proctor's e-mail address as listed in their HFMA member profile.
- HFMA National is not responsible for undelivered passwords or related messages due to an invalid e-mail address in a member's record. It is the responsibility of the proctor and the candidate to ensure their HFMA member profile is current and accurate.
- It is the responsibility of the candidate and proctor to ensure passwords are received in advance of the exam, and contacting HFMA National as appropriate.

### **Re-scheduling an Examination**

Candidates have a maximum of one year after registering for an exam in which to complete that exam.

The candidate wishing to reschedule and exam is responsible for the following:

- Informing the proctor as soon as possible of the need to re-schedule.
- Contacting the chapter, if the chapter is administering the exam, to determine when the chapter will next offer that exam. If the date conflicts with a candidate's schedule, the candidate may complete the exam on a day offered by another chapter.
- Informing HFMA Career Services in writing at [certification@hfma.org](mailto:certification@hfma.org). When doing so, the candidate must be prepared to identify the following:
  - The name of the proctor with whom the candidate was going to be taking the exam and the mutually agreeable date for the exam as established by the proctor and the candidate.
  - The proctor with whom the candidate will now be taking the exam and that rescheduled date

Candidates rescheduling an exam date more than two times will be subjected to a \$25 administrative fee for each subsequent requested change of date.

### **Reporting to the Examination Location**

Candidates should report to the exam location on the scheduled date about 10 minutes before the scheduled start time for the exam and bring the following items:

- The assigned password. The candidate and proctor each receive e-mail notification of their passwords about three business days in advance of the scheduled date for the examination.
- Photo identification, such as a valid driver's license
- Silent, battery operated, non-printing calculator

Proctors are fully responsible for coordinating any efforts required to ensure full functionality of the computers and the exam administration software. HFMA National staff support is available only during normal business hours.

The following are *not* allowed in the testing room/area:

- Blank “scratch” paper for use during the examination.
- Reference or other materials or paper of any type including books, newspapers, magazines, the self-studies or study aids, and personal notes.
- Electronic capture, recording or transmission devices of any kind
- Cell phones or other photographic/image capturing devices
- Communication with other candidates during the examination.
- Eating, drinking or use of tobacco

## **Taking the Examination**

Without permission of the proctor, candidates are not allowed to leave the exam room/area after the exam begins. Once familiar with the way the computer equipment works, candidate may start the exam.

- Enter password in the “Name” field.
- Approved proctor enters password in the “Password” field. Available exams are listed.
- Select from the available menu the exam to complete. If the wrong exam is listed, contact HFMA National immediately at 1-800-252-4362, ask for certification. Using unauthorized passwords or completing the wrong exam could invalidate the exam results.
- Agree to maintain confidentiality of the exam and to abide the policies and procedures stated in the CHFP Exam Candidate Handbook as agreed when the exam application was signed.
- Enter answers directly into the system by clicking the mouse on the selected answer. Once an exam section (i.e., questions corresponding to a content area/study guide chapter) is complete and responses to that section are submitted, a candidate is NOT allowed to go back into that section.
- After submitting the last exam section, responses are processed immediately and the overall score is presented. Candidates may print this screen for their records. Confirmation of the score is sent in an e-mail to the candidate’s e-mail address as listed in the HFMA member profile.

## **How the Examinations are Scored**

The HFMA BoE has worked with experts in testing and psychometrics to ensure that test items are valid and scoring is accurate, fair, valid, and verifiable. The HFMA National examinations are graded using scaled scores. The score is based on the total number of questions answered correctly. Unanswered questions are scored as incorrect. The minimum passing score is 21. Candidates do not receive detailed information about scores on sections or correctness of specific exam questions. Scores (including Pass or Fail status) are not shared by HFMA with anyone other than the candidate. HFMA discloses only aggregate score data that will not divulge or imply the result of an individual candidates score.

## **“Conditioned” Status**

To satisfy the HFMA National certification exam requirement, candidates must successfully complete both the Core exam and one of the specialty exams within 24 months of successfully completing the first exam. “Conditioned” status means the candidate has passed one of the two required exams. For example, if a candidate has passed the Core exam, and not the specialty exam, the candidate is in a “conditioned” status and required to successfully complete the specialty exam prior to the end of the 24-month period as part of the CHFP requirements.

If both exams are not successfully completed within the required 24-month period, both exams must be retaken. When retaking an exam, candidates must complete a CHFP Examination Application and submit it with the appropriate non-refundable fee.

## **Retaking an Examination**

If a candidate does not successfully complete an exam and would like to retake that exam, the candidate must repeat the exam application process, including submitting a completed exam application with the appropriate non-refundable fee. *The BoE will not permit exams to be retaken more often than once every 90 days.* For retakes, the candidate is assigned a different version of the exam that is composed of comparable, yet different questions. Exams scheduled for retakes will be a different version than the one just completed and will always be based on the current version of the exam.

## **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 at least 30 days prior to scheduling an examination date with a chapter or proctor. Requests will be handled on a case-by-case basis.



**HFMA**  
**Certification Exam Application**

**Membership Status.** *Are you an HFMA member?*

Yes. Member # \_\_\_\_\_ Chapter # \_\_\_\_\_  
 No. Membership is required to take the certification exams. Call 800-252-4362, ext 2 for information on membership.

**Contact Information**

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_  
Employer \_\_\_\_\_ Position title \_\_\_\_\_  
Business Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_  
Work Phone \_\_\_\_\_ FAX \_\_\_\_\_ e-mail \_\_\_\_\_

**Examination Information and Non-refundable Fees**

Place an X next to all exams for which you are applying. (NOTE: To become certified, the Core *and* one specialty exam must be successfully completed within a 24-month period.) Exams must be completed within one year of submitting an exam application or the fee paid will be forfeited.

**Fee**      \$125 Core Exam  
           \$100 Accounting & Finance Specialty Exam  
           \$100 Managed Care Specialty Exam  
           \$100 Patient Financial Services Specialty Exam  
           \$100 Financial Management of Physician Practice Specialty Exam  
           \$ 25 Expedite processing fee (less than 10 business days allowed for charge payment processing)  
           **TOTAL amount due**

Exam Date \_\_\_\_\_ Name of Proctor \_\_\_\_\_  
*Requested date must allow for the required payment processing time as described below. If not, scheduling of exam for requested date cannot be guaranteed. Application without an exam date or proctor name will not be processed.*

**Payment Information**

Check enclosed (payable to HFMA) for \$ \_\_\_\_\_ Check Number \_\_\_\_\_ (for tracking purposes)  
*(Allow 15 business days for processing of payment)*  
 Charge my: (check one)  VISA      MasterCard      Discover Card      American Express  
*(Allow 10 business days for processing of payment)*  
Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_  
Cardholder's Name \_\_\_\_\_ Cardholder's Signature \_\_\_\_\_

**Exam Candidate Signature ---- REQUIRED --**

By signing this application and submitting it, I agree to maintain confidentiality of the exam and to abide by the policies and procedures stated in the CHFP Exam Candidate Handbook.

\_\_\_\_\_  
Exam Candidate Signature

\_\_\_\_\_  
Date

**Submit the completed and signed application.** *Phone applications not accepted.*

**MAIL to:** HFMA, Accounting Department, Two Westbrook Corporate Center, Suite 700, Westchester, IL 60154  
**FAX to:** 708-531-0665 ATTN: Member Services Center (Credit card applications only)



## Requirements for CHFP Certification

The requirements for becoming a Certified Healthcare Financial Professional (CHFP) include submitting an application (within two years of successfully completing the first exam) to attest to the following:

- **Membership in HFMA** for a minimum of two (2) years (not necessarily consecutive years) and currently an active member in good standing.
- Successful completion the **Core exam and one specialty exam** within 24 months of successfully completing the first exam.
- At least two (2) years of **professional experience** in healthcare financial management.
- Meet the **education requirement**. Complete a minimum of 60 semester hours of course work at an accredited college or university. An alternative is to complete the equivalent of 60 hours of relevant professional development within two years prior to submitting the CHFP application. The BoE 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).
- Obtain **two references** and request the reference to complete the appropriate section of the CHFP application.
  - A reference from the CEO or the immediate supervisor of the candidate’s current employer. If the candidate is a CEO or self-employed, a reference may be provided by a client.
  - A reference must be from the candidate’s local HFMA Chapter President, President-Elect or other elected chapter officer.
- The candidate’s signature and the **seal of a notary public** are required. The original application must be mailed to HFMA National. Faxed or copied applications will not be processed.
- The one-time only, non-refundable **\$50 processing fee** must accompany the application (see next page). If the application is not accepted, HFMA National will return the application fee. The fee covers the expense for issuance of a certificate for one specialty.

## Announcement of Certification Results

Approximately 60 to 90 days after HFMA National receives a CHFP application, the designation is awarded if all requirements are met.

- If the application is found to be conforming, the designation will be awarded and the member’s record updated to reflect such
- If there are deficiencies in information provided or in meeting requirements for FHFMA, the candidate is informed of such and required to remove all deficiencies to be awarded the designation.
- If preliminary review indicates that the application requires review by the BoE Examiners, it will be reviewed at the BOE’s next scheduled meeting.

Certificates for members achieving CHFP status are mailed to the Chapter President for presentation to the candidate in a manner of their choice. Certificates are not mailed directly to the candidate.

## **Earning More than One Certification Specialty**

To become a CHFP, the exam requirement specifies that a candidate must successfully complete the Core exam and one specialty exam. Additional specialties may be earned after minimum requirements are met for becoming a CHFP.

- Candidates may earn additional specialties by successfully completing the exam for that specialty. To take additional exams, the candidate is required to submit the certification exam application and payment.
- Upon successful completion of the exam, the candidate is required to submit the Application for Additional Specialty with appropriate fees, as included following the Application for Additional CHFP Certification Specialty in the following section.
- Upon processing of the application, a certificate for the additional specialty(ies) will be issued. Processing of the application and certificate takes 60 to 90 days.
- Certificates are mailed to the Chapter President for distribution as deemed appropriate by the chapter.

## **Requesting a Duplicate or Replacement Certificate**

Candidates requesting a duplicate or replacement certificate must submit a Duplicate Certificate Request form (located following the Self-Study Course Order Form). The \$25 fee covers expenses for the certificate, postage, and required administrative resources.

**HFMA**  
**CHFP APPLICATION**

**Personal Information**

The certificate will be printed with the formal name exactly as it is in your member profile. Please be sure your profile is accurate.

HFMA Member # \_\_\_\_\_

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Home Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

**Education**

Place an "X" on the line describing how you are supplying this information with this application.

\_\_\_ Official college or university transcript or copy of diploma.

\_\_\_ Fulfilling requirement with 60 contact hours. List of relevant activities attached.

**Professional Experience**

**Current Employer** \_\_\_\_\_ Your Position Title \_\_\_\_\_

Employer's Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Work Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

Dates of Employment \_\_\_\_\_

**Prior Employer** \_\_\_\_\_ Your Position Title \_\_\_\_\_

Employer's Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Work Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

Dates of Employment \_\_\_\_\_

**References from CEO AND HFMA Chapter Officer**

Request each reference to provide the following information.

**CEO or Immediate Supervisor**

Name \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Business Phone \_\_\_\_\_ Business e-mail \_\_\_\_\_

I hereby declare that to the best of my knowledge the applicant is of good character and should be granted the duties and privileges of an HFMA certified member.

Signature \_\_\_\_\_ Date \_\_\_\_\_

*(Continued on back side of page)*

**HFMA**  
**CHFP APPLICATION**

**Chapter President, President-Elect or Other Elected Chapter Officer**

Name \_\_\_\_\_  
Career Title \_\_\_\_\_ Chapter Officer Title \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_  
Business Phone \_\_\_\_\_ Business e-mail \_\_\_\_\_

I hereby declare that to the best of my knowledge the applicant is of good character and should be granted the duties and privileges of an HFMA certified member.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Notarized Affidavit**

This section must be completed and signed by a notary public. The original application must be mailed to HFMA National. Copies of the application and/or faxes of it will not be processed.

I hereby declare before the proper authority that the statements contained in this CHFP Certification Application are correct to the best of my knowledge. I understand and by my signature subscribe to the HFMA Code of Ethics, with knowledge that any false statement or misrepresentation that I make in completion of this application may result in this application and issuance of a complaint of violation of said code.

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

County of \_\_\_\_\_ State of \_\_\_\_\_

Printed Name of Notary \_\_\_\_\_

Signature of Official Notary \_\_\_\_\_

Sworn and subscribed before me on this date \_\_\_\_\_

Seal

**Payment Information \$50.00 processing fee**

Check enclosed payable to HFMA for \$50.00 \_\_\_\_\_ Check number (for tracking purposes)  
 Charge my: (check one)     Visa     MasterCard     American Express     Discover Card  
Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_  
Cardholder's Name \_\_\_\_\_ Cardholder's Signature \_\_\_\_\_

**Allow 60-90 days for processing**

**Please mail completed original application and payment to:**

HFMA, Attn: Accounting Dept.  
Two Westbrook Corporate Center, Suite 700  
Westchester, IL 60154

HFMA

Application for Additional CHFP Certification Specialty

This application is intended for HFMA certified members in good standing who have earned an additional specialty by passing the HFMA certification exam for the specialty.

Personal Information

The certificate will be printed with your formal name exactly as it is in your member profile. Please be sure your profile is accurate.

Member # \_\_\_\_\_

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Home Address \_\_\_\_\_ HFMA Member # \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Home Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

Certification Status

Indicate the highest level of certification you have earned and the date the designation was awarded to you.

\_\_\_\_\_ CHFP on \_\_\_\_\_

\_\_\_\_\_ FHFMA on \_\_\_\_\_

Professional Experience

Current Employer \_\_\_\_\_ Your Position Title \_\_\_\_\_

Employer's Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Work Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

Dates of Employment \_\_\_\_\_

Notarized Affidavit

This section must be completed and signed by a notary public. The original application must be mailed to HFMA National. Copies of the application and/or faxes of it will not be processed.

I hereby declare before the proper authority that the statements contained in this CHFP Certification Application are correct to the best of my knowledge. I understand and by my signature subscribe to the HFMA Code of Ethics, with knowledge that any false statement or misrepresentation that I make in completion of this application may result in this application and issuance of a complaint of violation of said code.

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

County of \_\_\_\_\_ State of \_\_\_\_\_

Printed Name of Notary \_\_\_\_\_ Signature of Official Notary \_\_\_\_\_

Sworn and subscribed before me on this date \_\_\_\_\_

Seal

Continued on back side of page

HFMA

# Application for Additional CHFP Certification Specialty

**Payment Information for Additional Specialty(ies)**

I recently successfully completed the following certification exam(s) and am requesting a certificate be issued for the additional specialty(ies). Issuance of this certificated is based on HFMA's verification of the exam score.

<b>Additional Specialty</b>	<b>\$25 each</b>
Accounting and Finance Specialty	
Patient Financial Services Specialty	
Financial Management of Physician Practices Specialty	
Managed Care Specialty	
<i>Total Payment amount</i>	

Check enclosed payable to HFMA       Check number (for tracking purposes)

Charge my: (check one)       Visa     MasterCard     American Express     Discover Card

Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Cardholder's Name \_\_\_\_\_ Cardholder's Signature \_\_\_\_\_

***Allow 60 - 90 days for processing***

***Please mail completed original application and payment to:***

HFMA, Attn: Accounting Dept  
Two Westbrook Corporate Center, Suite 700  
Westchester, IL 60154

## Requirements for Fellowship in HFMA

The requirements for becoming a Fellow of the Healthcare Financial Management Association (FHFMA) include submitting an application to attest to the following:

- Be *certified as a CHFP* in HFMA. If all requirements are met, a candidate can apply concurrently for the CHFP and Fellow designation although the Fellow designation will be awarded the month following the CHFP designation being awarded, if all requirements are met.
- **Membership in HFMA** for at least five (5) years total (not necessarily consecutive) and currently an active current member in good standing.
- Provide a *reference* from a Fellow in HFMA or current officer of the local chapter.
- Meet the **education requirement**: Complete a B.A. or B.S. degreed program, 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).
- **Volunteer** in HFMA and/or the industry and complete **one** of the following:
  - Earn the HFMA *Follmer Bronze award* by earning 25 Founders points (for HFMA volunteer activity) under the current Founders Point system, or be former recipient of the award.
  - *Volunteer in the chapter*. Using the current Founders point 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.* For a list of eligible activities, refer to the HFMA web site.
  - *Volunteer service for two years in a healthcare industry organization* 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. A written report of the activities and verification are required. *These activities must have been completed within three years prior to submitting the FHFMA application*
- FHFMA application with signature and **seal of a notary public**. Original application must be mailed to HFMA National. Copied or faxed applications will not be processed.
- The one-time only, non-refundable **\$125 processing fee** must accompany the application (see next page). If the application is not accepted, HFMA will return the application fee.

## Announcement of Fellowship Application Results

Approximately 60 to 90 days after HFMA National receives an FHFMA application, the designation is awarded if all requirements are met.

- If the application is found to be conforming, the designation will be awarded and the member’s record updated to reflect such
- If there are deficiencies in information provided or in meeting requirements for FHFMA, the candidate is informed of such and required to remove all deficiencies to be awarded the designation.
- If preliminary review indicates that the application requires review by the BoE Examiners, it will be reviewed at the BOE’s next scheduled meeting.

Certificates for members achieving FHFMA status are mailed to the Chapter President for presentation to the candidate in a manner of their choice. Certificates are not mailed directly to the candidate.

## Requesting a Duplicate or Replacement Certificate

Candidates requesting a duplicate or replacement certificate must submit a Duplicate Certificate Request form (located following the Self-Study Course Order Form). The \$25 fee covers expenses for the certificate, postage, and required administrative resources.



# Fellow of HFMA Application

**Membership Status.** Are you currently a certified (CHFP) member of HFMA?

Yes. HFMA Member # \_\_\_\_\_

No. Being a certified member is required to become a FHFMA. View the FHFMA area of [www.hfma.org](http://www.hfma.org) to learn about becoming a FHFMA.

**Personal Information.** Your name will appear on your certificate exactly as you have it in your member profile. Please be sure your HFMA member profile is accurate.

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Home Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

**Education.** Bachelor's degree or 120 semester hours from an accredited college or university is required.

Place an "X" on the line describing how you are supplying this information with this application.

Education information already on file with HFMA.  Official transcript or a copy of diploma attached .

**Professional Experience.** List the most recent and prior employer. Attach additional pages as needed.

**Current Employer** \_\_\_\_\_ Your Position Title \_\_\_\_\_

Employer's Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

Dates of Employment \_\_\_\_\_

**Prior Employer** \_\_\_\_\_ Position Title \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

Dates of Employment \_\_\_\_\_

**Reference.** Obtain a reference from either a current FHFMA or an HFMA chapter officer.

Name \_\_\_\_\_ Chapter Officer Title \_\_\_\_\_

Career Title \_\_\_\_\_ Business Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Business Phone \_\_\_\_\_ Business e-mail \_\_\_\_\_

I hereby declare that to the best of my knowledge, the applicant is of good character and should be granted the duties and privileges of a Fellow of the HFMA.

Signature \_\_\_\_\_ Date \_\_\_\_\_

(Continued on back side)

## Fellow of HFMA Application

**Volunteer Activity:** *To indicate how you have met this requirement, check **one** of the following and attach required information.*

\_\_\_\_\_ Follmer Bronze Award earned \_\_\_\_\_ (year)

\_\_\_\_\_ Volunteer in the Chapter. *These activities must have been completed within three years prior to submitting the FHFMA application.* Attach a list of qualifying activities including a description of the activity and dates of participation. Include your name and HFMA member number on the attachment.

\_\_\_\_\_ Volunteer service for two years in the healthcare industry organization. Provide the name of the organization, description of the volunteer activity, date of volunteer activity, and a contact person with which HFMA National can verify the volunteer activity. *These activities must have been completed within three years prior to submitting the FHFMA application.* Include your name and HFMA member number on the attachment.

**Affidavit.** *This section must be completed and signed by a notary public.*

I hereby declare before the proper authority that the statements contained in this application for Fellowship are correct to the best of my knowledge. I understand and by my signature subscribe to the HFMA Code of Ethics, with knowledge that any false statement or misrepresentation that I make in completion of this application may result in this application and issuance of a complaint of violation of said code.

Signature of Applicant \_\_\_\_\_ Date: \_\_\_\_\_

County of \_\_\_\_\_ State of \_\_\_\_\_

Sworn and subscribed before me on this date \_\_\_\_\_

Signature of Official Notary \_\_\_\_\_ Printed Name of Notary: \_\_\_\_\_

Seal

**Payment Information.** *\$125.00 processing fee*

\_\_ Check enclosed payable to HFMA for \$125.00 \_\_\_\_\_ Check number (for tracking purposes)

\_\_ Charge my: (check one)    \_\_ Visa    \_\_ MasterCard    \_\_ American Express    \_\_ Discover Card

Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Cardholder's Name \_\_\_\_\_ Cardholder's Signature \_\_\_\_\_

***Allow 60-90 days for processing***

***Please mail completed application with payment to:***

HFMA, Attn: Accounting Dept; Two Westbrook Corporate Center, Suite 700  
Westchester, IL 60154

## MAINTAINING CERTIFICATION - CHFPA and FHFMA

Attaining an HFMA certification designation indicates achievement of a high level of professional competence that is measured by meeting certain experiential and professional requirements. The HFMA Board of Directors requires that both CHFPA and FHFMA complete professional educational activities to demonstrate they are maintaining their technical and professional competence. All certified members are required to maintain their designation through participation in continuing education every three years, with the reporting period being June 1 of the year CHFPA was earned and ending May 31 three years later. Subsequent maintenance reporting cycles are every three years thereafter.

### Requirements for Certification Maintenance

The BoE has specified the following maintenance requirements:

- Certified members are required to be **active members of HFMA** and in good standing. Failure to renew membership will result in removal of the CHFPA and FHFMA designations.
- Certified members are required to accumulate a total of **90 contact hours** in eligible professional development activities over the three-year period with a minimum of **20 contact hours per year and at least 50% of the contact hours (45 hours) being healthcare finance focused**. The remaining required hours may be attained by attending eligible programs and professional activities that contribute to the development of business and/or technical skills.
- A **contact hour is defined** as 50 minutes of continuous programming less breaks, meals, social activities, etc.

- Candidates are required **self-report** eligible activities in an on-line system available to members only on the HFMA web site at: [http://www.hfma.org/members\\_only/certification/education\\_activity.cfm](http://www.hfma.org/members_only/certification/education_activity.cfm). This is the only record that will be reviewed by HFMA National to determine if the maintenance requirements have been met. *Hard copy records will no longer be accepted.*

*Members are required to keep their records current for all education activities they attend, including proctoring HFMA exams, local chapter education events, or other professional organization activities. HFMA National will record all education activities for which a CPE letter was issued to the member. Refer to Appendix A for information on how to report education activities and how to view reported 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, i.e. the “good thru” date.
- Candidates are responsible for ensuring the **accuracy and completeness of their records by June 1 of the year maintenance is required**. Candidates with deficiencies will be required to eliminate that deficiency by September 1 of the year in which maintenance is required. The three-month grace period is for the reporting of relevant education activities, not additional time to complete/attend additional education activities to meet the 90-hour requirement. Failure to report eligible activities by the end of the grace period will result in loss of the designation.

For **eligible education activities**, see Appendix B.

In lieu of participating in the Certification Maintenance program, certified members can retain currency by successfully re-taking both the Core and specialty examinations, and submitting required personal references.

## Failure to Maintain Certification

The BoE policy states that a member's failure to complete the above maintenance requirements, including remaining an active HFMA member, will result in removal of the certification designation.

- After the *three-month grace period* has expired (i.e., September 1 of the year maintenance is required) without the certified member meeting the certification maintenance requirements, the member must complete the entire certification process again, including re-taking the certification examinations and meeting all other requirements.

## Exceptions for Maintenance

Retired Members - Upon becoming retired fully from full-time employment and informing HFMA in writing ([certification@hfma.org](mailto:certification@hfma.org)) of a retired status, the BoE will grant HFMA certified members in good standing an "emeritus" status. Members with this designation are exempt from the certification maintenance requirements and automatically retain their HFMA certification designation *as long as retired membership status is retained*.

### Waiver Request

Candidates who are unable to meet the requirements for application certification maintenance due to unusual and/or extenuating circumstances (such as these listed below) may request a waiver from stated policy and procedures by presenting a formal request for such a waiver to the BoE prior to the end of the 90-day grace period for your reporting cycle. Candidates must put all requests in writing and submit the written waiver request to the HFMA Director of Professional Development, Joseph G. Abel ([jabel@hfma.org](mailto:jabel@hfma.org)).

- **Foreign Residency** – The request should include the country of residence, the name of the employer, the principal duties and responsibilities performed, and the reason foreign residency prohibits fulfilling this requirement.
- **Health**—The request should include the nature of the illness, the name and address of the attending physician, and the reason the illness prohibits fulfilling this requirement.
- **Military Service** – The request should include the principal duties performed, where stationed, the name and address of member's commanding officer, and the reason why military service prohibits fulfilling this requirement.
- **Other Similar Reasons** – The request should include the nature of the hardship and the reason why it prohibits fulfilling the Certification Maintenance requirements.

The BoE Executive Council reviews the written waiver request and determines whether the request will be allowed and/or by what date evidence of maintaining the designation must be met. When waivers are presented to the BoE, the following materials will be provided:

- A copy of any letter or document provided by the member making the appeal, with all identifying information removed.
- A synopsis by staff presenting the important points of the request, with additional information as appropriate. Staff will also provide references to similar waiver requests from the history of requests to provide BoE members with a frame of reference.

## Loss of Certification Designation

In addition to loss of designation through failure to meet the maintenance as well as active membership requirements, the HFMA certification designations, CHFP and FHFMA, will be revoked if a certified member is found to have violated the HFMA Code of Ethics and/or is expelled from membership by the HFMA Board of Directors. Those losing their designation due to failing to maintain during the required year will be required to meet all requirements for becoming certified, including successfully completing the Core and a specialty exam, among other requirements.

# HFMA Certification Program 2007-2008 Self-Study Guides

## Order Form

**Today's Date:** \_\_\_\_\_

Check here if you are the Chapter Certification Point of Contact \_\_\_\_\_

**FAX:**

708-531-0665

*Charge orders only*

**Mail:**

HFMA Attn. Accounting Dept.  
2 Westbrook Corporate Ctr., Suite 700  
Westchester, IL 60154

**Ordered by:** \_\_\_\_\_

Company/Organization \_\_\_\_\_

Name \_\_\_\_\_

HFMA Member Number \_\_\_\_\_

Address (No P. O. Boxes please) \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

ZIP code \_\_\_\_\_

Day-time phone number \_\_\_\_\_

**Payment Information**

\_\_\_ Check enclosed, made payable to HFMA

\_\_\_ Charge: \_\_\_ Master Card \_\_\_ Visa  
(check one)

\_\_\_ American Express \_\_\_ Discover Card

Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_  
Mo. Yr

Cardholder Name: \_\_\_\_\_

Signature: \_\_\_\_\_  
*Required for charge orders*

Cardholder phone number \_\_\_\_\_

Fax number \_\_\_\_\_

Course code	Course	Qty	Unit Price	Total Price
CCORE07	HFMA Certification Core Program (2007-2008)		\$325	
CACCT07	HFMA Certification Accounting & Finance Specialty (2007-2008)		\$295	
CPFS07	HFMA Certification Patient Financial Services Specialty (2007-2008)		\$295	
CPPM07	HFMA Certification Financial Management of Physician Practices Specialty (2007-2008)		\$295	
CMC07	HFMA Certification Managed Care Specialty (2007-2008)		\$295	

**MERCHANDISE TOTAL**

*Illinois residents only:* Add 7.75% of merchandise total for tax.

**TAX**

**Shipping**

\_\_\_ \$10 for each course

**Rates:**

\_\_\_ \$25 per course for 2-day delivery

(Check one)

\_\_\_ \$45 per course for next day delivery

**SHIPPING**

**TOTAL PRICE**

NOTE: Please allow 2 business days for processing order payment. Materials are shipped after payment is processed. Allow 10 additional business days to process orders paid by check. If expedite shipping is not requested, allow orders shipped via UPS ground service to arrive in 5-10 business days (contingent on destination). UPS cannot ship to P.O. boxes.



**HFMA Certification Program**

**Request for Duplicate CHFP or FHFMA Certificate**

Upon confirming the designation was earned and is still valid, HFMA will begin processing of the duplicate certificate. The date of the designation on the certificate will be the date it was earned. ***Processing of the certificate takes 60 to 90 days.*** The replacement certificate will be mailed directly to the member requesting it.

Today's Date: \_\_\_\_\_

**Personal Information**

Your name will appear on your certificate exactly as you have it in your member profile. Please be sure your profile is accurate.

Member # \_\_\_\_\_

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Home Address \_\_\_\_\_ HFMA Member # \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Home Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

**Certification Status**

Duplicate certificate for:	\$25 each
CHFP - Accounting and Finance Specialty	
CHFP - Patient Financial Services Specialty	
CHFP - Financial Management of Physician Practices Specialty	
CHFP - Managed Care Specialty	
FHFMA	
<b>Total Payment amount</b>	

Check enclosed payable to HFMA      \_\_\_\_\_ Check number (for tracking purposes)

Charge my: (check one)       Visa     MasterCard     American Express     Discover Card

Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Cardholder's Name \_\_\_\_\_ Cardholder's Signature \_\_\_\_\_

***Please mail completed original application and payment to:***

HFMA, Attn: Accounting Dept  
Two Westbrook Corporate Center, Suite 700  
Westchester, IL 60154



## Entering Education Activity into your On-line Record

Under the certification area of the HFMA website (Maintaining my Certification), you can access the on-line reporting tool. Follow this link to the data entry page for educational points:

<http://www.hfma.org/certification/certmaintenance/> .

The on-line tool is available to certified members only. It is the tool in which certified members must record education activities to show evidence of meeting the certification maintenance requirements. Hard copy documentation is no longer accepted. The education reporting tool is available at:

[http://www.hfma.org/login/index.cfm?script\\_name=/Site/certification/education\\_activity.cfm](http://www.hfma.org/login/index.cfm?script_name=/Site/certification/education_activity.cfm)

If you are not already logged in to the member area, click on the link above. You will be required to log in before entering data.

Type your HFMA membership ID number. (It is a 7-digit number). Click on the **Submit** button.

The screenshot shows the HFMA website interface. At the top, there is a navigation bar with links for Home, Search Keyword, Go, Advanced Search, Topics, Login, and Become a Member. Below this is the HFMA logo and the text "healthcare financial management association".


On the left side, there is a vertical menu with links to: About HFMA, Jobs & Careers, Membership, Resource Library, News, hfm Magazine, HFMA Publications, Education & Events, Certification, Chapter Leader Resources, Special Interest Forums, and Vendor Opportunities. Below this menu is a "Locate A Chapter" section with a dropdown menu labeled "Choose a State".

The main content area is titled "Education Activity - Online Reporting Tool". It contains the following text: "Please enter your membership identification number and select submit." Below this text is a form with the label "Enter Member ID" and a text input field containing the number "7023145". A "Submit" button is located below the input field.

At the bottom of the page, there is a footer with links for Job Bank, Store, My Account, Contact Us, Site Map, and Printer Friendly Page. Below these links is the text: "Legal Statement | Privacy Policy | Copyright Healthcare Financial Management Association. All rights reserved".

The following screen will be displayed with your information.

Home	<input type="text" value="Search Keyword"/>	Go	Advanced Search	Topics	Login	Become a Member
------	---	----	-----------------	--------	-------	-----------------


healthcare financial management association

About HFMA

Jobs & Careers

Membership

Resource Library

News

hfm Magazine

HFMA Publications

Education & Events

Certification

Chapter Leader Resources

Special Interest Forums

Vendor Opportunities

**Locate A Chapter**

▼

## Education Activity - Online Reporting Tool

Hello Karen E. Jesernig!

**Your Certification Maintenance Due Date is: 05/31/2006**

**Directions:**

As an HFMA certified members maintaining certification, you are required and personally responsible for recording the education activities in which you have participated.

You must submit the required information for each education activity that you complete, with the exception of HFMA National activities for which you received a CPE letter from HFMA National. HFMA National will record these activities only.

For a description of eligible education activities, click [here](#).

For each education activity, enter the requested information. (All fields are mandatory to have the activity added to your record.) After entering the information, hit the submit button. By submitting the information, you are attesting to the accuracy of the information provided and agreeing to abide by the HFMA Code of Ethics.

<b>Category</b>	<input type="text" value="Group Live"/> ▼
<b>Type</b>	<input type="text" value="HFMA Other"/> ▼
<b>Exact Title</b>	<input type="text" value="Healthcare Accounting"/>
<b>Start Date</b>	<input type="text" value="05/06/2006"/> (mm/dd/yyyy)
<b>End Date</b>	<input type="text" value="05/06/2006"/> (mm/dd/yyyy)
<b>Location</b>	<input type="text" value="Dallas, TX"/>
<b>Sponsor</b>	<input type="text" value="None"/>
<b>Contact Hours</b>	<input type="text" value="Healthcare Finance"/> ▼
<b>Number of Contact Hours</b>	<input type="text" value="2.5"/>

**Disclaimer**

The Certification Maintenance Due Date (i.e., *Good Thru Date*) is the date by which you must show evidence of meeting the maintenance requirement for the three-year reporting cycle beginning June 1 of the year three years prior to the Good Thru Date.

Enter an education activity by providing the information requested in the boxes above. Then click on the **SUBMIT** button on the bottom of the page.

- You can enter only one activity at a time.
- You do not have capability to edit your record.

After you have entered an activity, you should see a confirmation screen as shown on the next page. Be advised that it takes at least one hour for the activity you entered to be downloaded into your member record.

## Education Activity

The information entered has been processed.

To add another Education Activity to your record, click [here](#).

If you have more educational activities to add, click on 'here' to add the next education activity. Members do not have capability to edit their education record. If edits are required, please contact HFMA National with detailed information about the required changes by sending an e-mail to [certification@hfma.org](mailto:certification@hfma.org)

### Viewing Educational Activity in Your Record

There are two ways to view the Educational activity associated with your member record. You must be logged into the HFMA website to access these areas.

#### **Option One for Reviewing Education Record**

Once logged in, you will see the following screen.

**Personal Profile**  
Karen Jesernig  
ID: 7023145  
Security

**Additional Tools**  
Founders Points  
Contacts  
URLS  
Email Lists  
Comments  
Pages  
Reports  
Primary Forum  
Secondary Forum

**Member Directory**  
Search  
Speed Search

**My Account**

From this section, you are given the tools to: (1) View and change your contact information and demographics (2) View your Event and Order transactions (3) View all activities (i.e. committee assignments, CPE credits reported, Founders points reported..) (4) Search the HFMA membership directory (5) Change your login ID and password (6) Pay membership dues annually

**Personal Profile Information**

To view your current contact information on file, click on your name or ID# located under the "Personal Profile" heading in the left hand navigation. You can change your Username and/ or Password by clicking on the link called "Security". If you have not paid your membership dues for next year, you will see a notice in this section that allows you to process payment quickly and efficiently.


**Founders Points**

Download a list of the current [Founders point categories, point allocations and award levels](#). Download instructions on [how to locate you Founders points. Questions? Please e-mail chapter@hfma.org](#).

**Reports**

Chapter Leaders of local chapters have access to membership reports. If you are eligible, you will see a link in the left hand navigation under Additional Tools. Reports are available in Flash Player, Microsoft Excel® and Adobe Acrobat® versions.

To bring up your personal HFMA profile, click on your name under **Profile**.


**hfma™** healthcare financial management association

[Account Home](#) | [Return to HFMA Home Page](#) | [Meetings](#) | [Admin](#)
[Logout](#)

**Personal Profile**  
 Karen Jesernig  
 ID: 7023145  
 Security

**HFMA**  
 Hfma  
 Karen E. Jesernig

[← back](#) [edit](#) [events & orders](#) [relationships](#) [notes](#) [activities](#) [billing](#) [security](#) [more info](#) [login as](#)

To bring up all the activities that HFMA has on file in your member record, click on the **Activities** button. This screen shows all the different types of activities in your HFMA record, including CPE awarded to you and Education Points you entered into the on-line tool. Your activity list may differ from the one shown below.


**hfma™** healthcare financial management association

[Account Home](#) | [Return to HFMA Home Page](#) | [Meetings](#) | [Admin](#)
[Logout](#)

**Personal Profile**  
 Karen Jesernig  
 ID: 7023145  
 Security

**Additional Tools**  
[Founders Points](#)  
[Contacts](#)  
[URLS](#)  
[Email Lists](#)  
[Comments](#)  
[Pages](#)  
[Reports](#)  
[Primary Forum](#)  
[Secondary Forum](#)

**Member Directory**  
[Search](#)  
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**Activities Available for Hfma - Karen E. Jesernig**
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Select Activity

- [ADVMEMROLL](#) - Advanced Member Rollover
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- [CPE](#) - Continuing Education
- [DROP](#) - Dropped from HFMA membership
- [DUES](#) - Dues Payments
- [EDU\\_PTS](#) - Certified Members Educational Points
- [FNDRAWARD](#) - Founders Award Received

To see a listing of education activities that you entered into the on-line education reporting tool, click on the **EDU\_PTS** line

You will see a report that contains information like that included in the sample report shown below.


healthcare financial management association

[Account Home](#) | [Return to HFMA Home Page](#) | [Meetings](#) | [Admin](#)
Logout

**Personal Profile**

Karen Jesernig  
ID: 7023145  
Security

**Additional Tools**

- [Founders Points](#)
- [Contacts](#)
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### Activities of Hfma Karen E. Jesernig

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insert activity

Type	Description	Date Entered	Ticker Date
<a href="#">EDU_PTS</a>	Healthcare Accounting	10/26/2006	07/08/2006
<a href="#">EDU_PTS</a>	Test KEJ	04/25/2006	06/03/2005
<a href="#">EDU_PTS</a>	III	11/21/2005	05/05/2005
<a href="#">EDU_PTS</a>	fdgfdgdfg	11/21/2005	05/08/2005
<a href="#">EDU_PTS</a>	Test Title	01/07/2005	12/05/2004
<a href="#">EDU_PTS</a>	HFMA Chapter Seminar	11/15/2004	11/15/2004
<a href="#">EDU_PTS</a>	CFO Revenue Strategies Conference	11/15/2004	09/10/2004
<a href="#">EDU_PTS</a>	Healthcare Conference	11/15/2004	10/11/2004
<a href="#">EDU_PTS</a>	Manging Healthcare Opportunities	10/17/2004	11/15/2004

To get specific details about an individual education activity, click on **EDU\_PTS** to the left of the activity for which you want to see the detail. Below, is an example of the detail.

### Activity for Hfma - Karen E. Jesernig

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<b>Activity Type:</b>	EDU_PTS
<b>Date Entered:</b>	10/26/2006 (mm/dd/yyyy)
<b>End Date:</b>	07/08/2006 (mm/dd/yyyy)
<b>Start Date:</b>	07/08/2006 (mm/dd/yyyy)
<b>Type:</b>	HFMA Other
<b>Category:</b>	Group Live
<b>Contact Hours:</b>	Healthcare Finance
<b>Total Points:</b>	2.50
<b>Description:</b>	Healthcare Accounting
<b>Location:</b>	Location : Dallas, TX/Sponsor:

To return to the list of all EDU\_PTS that are in your record, click on the **back** button.

### *Option Two for Reviewing Education Record*

The second way to view your points is in a report format. To access the Education summary report, follow this link: [http://www.hfma.org/asi\\_eseries/scriptcontent/reports/EDU\\_CPE\\_Report.cfr](http://www.hfma.org/asi_eseries/scriptcontent/reports/EDU_CPE_Report.cfr)

*YOU MUST BE LOGGED INTO THE WEB SITE TO VIEW THIS REPORT.*

If you encounter errors, it is because you are not logged in. Click on the  button from anywhere on the web site to log in.

Below is a screen shot of a sample report. It summarizes the CPE that HFMA has recorded to you and the Education Activities that you have entered.

hfma Healthcare Financial Management Association Current Education and CPE Points				
Karen E. Jesernig		Good Thru Date: May-31-06		26 October 2006
Type	Date	Event Type	Event Title	Points
EDU_PTS	Sep-10-2004	Group Live	CFO Revenue Strategies Conference	6.50
	Nov-15-2004	Group Live	Healthcare Conference	1.60
		Group Live	Manging Healthcare Opportunities	2.50
	Dec-05-2004	Group Live	Test Title	1.50
	May-05-2005	Group Live	llll	2.00
	Jun-03-2005	Group Live	Test KEJ	3.50
	Jul-08-2006	Group Live	Healthcare Accounting	2.50
	Oct-18-2004	Presenter	HFMA Chapter Seminar	5.20
	May-08-2005	Proctor	fdgfdgdfg	2.00
				27.30

To return to the HFMA web site, click the **BACK** button on your browser

*You also have access to your on-line education record by clicking on links provided at the end of the online reporting tool.*

- The education activity record will first list the CPE that HFMA has awarded to you for attending HFMA National activities for which you received a CPE letter.
- It will next list all education points/contact hours that you have entered for activities you completed such as attending chapter-sponsored education sessions, completing education programs sponsored by other professional organizations, reviewing scripts, proctoring exams, etc.
- The total number of hours (i.e., CPE plus education points/contact hours will appear at the end of the report.

By clicking on the corresponding link, you can review the report for each of the following time periods:

- Three years back from your current good thru date
- Total HFMA membership record

## HFMA Certification Maintenance Eligible Education Activities *(subject to change)*

<b>Eligible Topic Areas for Certification Maintenance</b>
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The following list describes education program topic areas that are eligible toward the certification maintenance requirement. On the pages that follow are the types of professional development activities that are eligible toward the HFMA certification maintenance requirement.

- Accounting and governmental accounting
- Auditing and governmental auditing
- Administrative practices including Management advisory services (MAS) practice skills
- Social environment of business such as planning and control systems, manufacturing, marketing, research and development
- Regulatory ethics
- Business law
- Business management and organizations as related to the management of an organization including IT systems, organization structures, and management planning
- Finance such as topics related to specific financial management of an organization and including budgeting, asset management and contracting.
- Healthcare finance, including HFMA national programs
- Management advisory services such as related to key processes, achieving efficiencies, improving cash flow and maintaining profitability
- Marketing including market analysis, methods and the integration of other strategies to achieve marketing goals
- Behavioral ethics including topics related to general professional ethic programs
- Communications including interview techniques, business writing, business presentations, group dynamics, public relations, and group process management
- Personal development including career planning and time management
- Personnel/human resources including topics related to how organizations attract, motivate, develop and retain employees
- Computer science including networks, communication, the Internet, hardware, software applications
- Economics including topics related to principles of pricing, stabilization, supply and demand, monetary policy, and economic growth.
- Production as related to production scheduling, inventory control standards to pay and production, and quality control
- Statistics including multivariate distributions, estimates of parameters, linear models, analysis of variance, etc.
- Taxes

**HFMA Certification Maintenance -- Eligible Education Activities** *(subject to change)*

Categories of activities eligible for contact hours are listed in the first column of the table. Specific types of activities for each category are listed in the second column. For any activity completed by certified members toward their certification maintenance requirement, the member must be able to show evidence of satisfactory completion of the education activity, including but not limited to quizzes, test, or program evaluation. For a description of each type of activity, refer to the information that follows this table.

Education Activity Category	Type of Education Event
<p><b>Group Live:</b> A structured learning event on a given subject that allows interaction with the instructor and participants.</p>	<ul style="list-style-type: none"> <li>• College Course</li> <li>• HFMA Audiowebcast (AWC)</li> <li>• HFMA National Seminars*</li> <li>• HFMA Other, e.g. chapter meetings</li> <li>• Non-HFMA Seminars</li> </ul>
<p><b>Presenter:</b> Delivering a structured learning event on a given subject that allows interaction with and between participants.</p>	<ul style="list-style-type: none"> <li>• College Course</li> <li>• HFMA National Seminars*</li> <li>• HFMA Other, e.g. chapter meetings</li> <li>• Non-HFMA Seminars</li> </ul>
<p><b>Proctor:</b> Monitoring and supervising an exam session</p>	<ul style="list-style-type: none"> <li>• HFMA Certification Exam Proctor</li> </ul>
<p><b>Publication:</b> Authoring or reviewing a professional publication</p>	<ul style="list-style-type: none"> <li>• Author HFMA Publication</li> <li>• Author non-HFMA Publication</li> <li>• Review HFMA Publication</li> </ul>
<p><b>Self Study:</b> An educational process designed to permit a participant to learn independently, on-line, and without involvement of an instructor. Program provides opportunities to assess knowledge and skills gained throughout the program.</p>	<ul style="list-style-type: none"> <li>• Certification Self-Study Courses*</li> <li>• HFMA e-learning</li> <li>• Non-HFMA</li> </ul>

*\*Do not add these activities to your Education Activity Report. After issuing the CPE letter, HFMA National updates the CPE portion of the member's record.*

## HFMA Certification Maintenance -- Eligible Education Activities *(subject to change)*

<b>Group Live Activity</b>	<b>Description</b>
College course	<p><b>Description:</b> Completion of a college or university course offered by an institution accredited by agencies recognized by the US Department of Education (DoE) and/or the Council for Higher Education Accreditation (CHEA). Topic area should be related to health care, finance or related technical skills and/or professional development.</p> <p><b>Examples:</b> Courses in an MBA program or accounting, healthcare, marketing, IT/IS, human resources</p> <p><b>Contact Hours:</b> 15 hours per semester-long course or 10 hours per quarter-long course</p> <p><b>Maximum allowed:</b> 45 hours per reporting period</p>
* HFMA AWC	<p><b>Description:</b> 2-hour audio web cast broadcast on current and specialty interest topics. Presenter is specialist in that field. Offered nearly weekly. Counts toward the 45 contact hour maintenance requirements for healthcare finance education.</p> <p><b>Contact Hours:</b> 2 contact hours per AWC. An evaluation form must be completed and submitted to HFMA National in order to receive CPE credit for participating in the AWC.</p> <p><b>Maximum hours allowed:</b> No limit</p>
* HFMA National Seminars	<p><b>Description:</b> Programs offered by HFMA including seminars, clusters, and conferences. Counts toward the 45 contact hour maintenance requirement for healthcare finance education</p> <p><b>Examples:</b> ANI, LTC, Revenue Cycle conference, etc.</p> <p><b>Contact Hours:</b> Amount of CPE/contact hours as published for the given event</p> <p><b>Maximum hours allowed:</b> No limit</p>
HFMA other	<p><b>Description:</b> Regional or chapter meetings covering technical issues or topics that contributes to professional growth in the healthcare finance field. Does NOT include update meeting related to operational aspects of a chapter or region.</p> <p><b>Examples:</b> Monthly Chapter or regional meeting</p> <p><b>Contact Hours:</b> Relevant portion of meeting in minutes divided by 50</p> <p><b>Maximum hours allowed:</b> No limit</p>
Non-HFMA Program	<p><b>Description:</b> Programs offered by other organizations, institutions, or vendors including seminars and conferences covering topics such as healthcare, finance, IT/IS, management, marketing and other business skills. Does not include networking/social activities.</p> <p><b>Examples:</b> Programs offered by employers not covering the company's operational issues, seminars offered by AICPA, AHIMA, AMA, etc.</p> <p><b>Contact Hours:</b> Total length of session in minutes, excluding meals and breaks, divided by 50.</p> <p><b>Maximum hours allowed:</b> No limit</p>

*\*Do not add these activities to your Education Activity Report. After issuing the CPE letter, HFMA National updates the CPE portion of the member's record.*

**HFMA Certification Maintenance -- Eligible Education Activities** *(subject to change)*

<b>Presenter Activity</b>	<b>Description</b>
College course	<p><b>Description:</b> Instructor of a college or university course offered by an institution accredited by agencies recognized by the US Department of Education (DoE) and/or the Council for Higher Education Accreditation (CHEA). Topic area should be related to health care, finance or related technical skills and/or professional development. Contact hours awarded only for the first offering of the course. <i>Full-time college/university instructors or professors are not eligible to receive contact hours in this category.</i></p> <p><b>Examples:</b> Courses in an MBA program or accounting, healthcare, marketing, IT/IS, human resources</p> <p><b>Contact Hours:</b> 15 hours per semester-long course or 10 hours per quarter-long course – for first time only of course.</p> <p><b>Maximum hours allowed:</b> 45 hours per reporting period</p>
HFMA National Program	<p><b>Description:</b> Instructor at a seminar, presenter at a conference or member of a panel discussion at an HFMA National sponsored event, excluding presentations covering product promotion</p> <p><b>Examples:</b> Presenter at Revenue Cycle, instructor or panel member at ANI session</p> <p><b>Contact Hours:</b> For the <u>first time only</u> of a presentation; based on the portion presented if there are multiple presenters/panel members; up to twice the length of the presentation for preparation time plus the length of the actual session. If CPE has been awarded for attending the conference, CPE will be awarded only for the prep time and not the presentation time. CPE must be requested from HFMA National for qualifying presentations.</p> <p><b>Maximum hours allowed:</b> No limit</p>
HFMA Other	<p><b>Description:</b> Instructor, presenter or panel member at chapter/ regional seminar, excluding presentations covering operational issues or product promotion</p> <p><b>Examples:</b> Chapter meetings or regional meetings</p> <p><b>Contact Hours:</b> For the <u>first time only</u> of a presentation: based on the portion presented if there are multiple presenters/panel members; up to twice the length of the presentation for preparation time plus the length of the actual session. If contact hours have been awarded for attending the session, they will be awarded only for the prep time and not the presentation time. Contact hours equal total time in minutes for the length of presentation, divided by 50.</p> <p><b>Maximum hours allowed:</b> No limit</p>
Non- HFMA Program	<p><b>Description:</b> Presenter at a seminar or conference; panel member at programs offered by other organizations, institutions, or vendor that cover topics such as healthcare, finance, management, business skills, etc. Does NOT include topics on operational issues or product promotion.</p> <p><b>Examples:</b> Programs offered by employers not covering the company’s operational issues, seminars offered by AICPA, AHIMA, AMA, etc.</p> <p><b>Contact Hours:</b> For the <u>first time only</u> of a presentation; based on the portion presented by if there are multiple presenters/panel members, up to twice the length of the presentation for preparation time plus the length of the actual session. If contact hours have been awarded for attending the conference, they will be awarded only for the prep time and not the presentation time. Contact hours equal total time in minutes for the length of presentation, divided by 50.</p> <p><b>Maximum hours allowed:</b> No limit</p>

*\*Do not add these activities to your Education Activity Report. After issuing the CPE letter, HFMA National updates the CPE portion of the member’s record.*

**HFMA Certification Maintenance -- Eligible Education Activities** *(subject to change)*

<b>Proctoring Activity</b>	<b>Description</b>
HFMA Certification Exam Proctor	<p><b>Description:</b> On-site monitoring and supervision of the HFMA certification exams within compliance of HFMA policies and procedures</p> <p><b>Contact hours:</b> 1 per testing session/date, regardless of number of candidates. Must be self-reported in online education reporting tool.</p> <p><b>Maximum hours allowed:</b> 12 contact hours per reporting period</p>

<b>Publication Activity</b>	<b>Description</b>
Author HFMA publication	<p><b>Description:</b> Writing HFMA self study training material, certification exam questions, developing an article for an HFMA National publication</p> <p><b>Examples:</b> Writing certification course materials, writing an article for HFM, writing an article for an HFMA chapter newsletter; developing questions for the certification exams</p> <p><b>Contact Hours:</b> The total number of minutes invested in the activity divided by 50</p> <p><b>Maximum hours allowed:</b> 23 hours total per reporting period combined for authoring and reviewing publications</p>
Author non-HFMA publication	<p><b>Description:</b> Writing an article for a non-HFMA publication or writing a manuscript</p> <p><b>Examples:</b> Writing an article for the AMA journal writing a book on health care or finance related topic</p> <p><b>Contact Hours:</b> The total number of minutes invested in the activity divided by 50</p> <p><b>Maximum hours allowed:</b> 23 hours total per reporting period combined for authoring and reviewing publications</p>
Reviewer HFMA publication	<p><b>Description:</b> Reviewing training materials or HFMA publications for accuracy and completeness from a content expert standpoint</p> <p><b>Examples:</b> Reviewing pre-published version of certification course materials or e-lessons HFM articles</p> <p><b>Contact Hours:</b> The total number of minutes invested in the activity divided by 50. If CPE has been awarded, education points/contact hours should no be reported.</p> <p><b>Maximum hours allowed:</b> 23 hours total per reporting period combined for authoring and reviewing publications.</p>

*\*Do not add these activities to your Education Activity Report. After issuing the CPE letter, HFMA National updates the CPE portion of the member's record.*

**HFMA Certification Maintenance -- Eligible Education Activities** *(subject to change)*

<b>Self Study Activity</b>	<b>Description</b>
*HFMA Certification Course	<p><b>Description:</b> HFMA self-study course for which activities have been completed at the minimum performance level as stated in the study guide and for which required documentation has been submitted as evidence of completion.</p> <p><b>Examples:</b> HFMA print version study guide course for Core and each of the specialties: Accounting and Finance, Patient Financial Services, Managed Care and Management of Physician Practices.</p> <p><b>Contact Hours:</b> Equals the amount of CPE as published. Contact hours are NOT awarded for the time taken to complete the corresponding certification exams. Required documentation as described in the course, must be submitted to receive the CPE credit.</p> <p><b>Maximum hours allowed:</b> CPE as published in the books</p>
HFMA e-learning	<p><b>Description:</b> HFMA on-line program completed independently. Is not CPE-eligible. Receives contact hours only.</p> <p><b>Examples:</b> HFMA e-lessons/course as hosted by Web-Inservice</p> <p><b>Contact Hours:</b> 1 hour for every three lessons completed, e.g., a course with 10 lessons will be eligible for 3 contact hours.</p> <p><b>Maximum hours allowed:</b> No limit</p>
Non -HFMA	<p><b>Description:</b> Self-study program offered by a vendor other than HFMA and that is completed independently. Includes traditional self-study programs as well as on-line programs. Covers topics in healthcare, finance, business skills, marketing, and management skills.</p> <p><b>Examples:</b> HFMA e-lessons or courses as offered through the AICPA or others</p> <p><b>Contact Hours:</b> Actual completion time in minutes divided by 50. If the program is CPE eligible through another organization contact hours will be awarded based on that level of CPE designated for the program.</p> <p><b>Maximum hours allowed:</b> No limit</p>

\*Do not add these activities to your Education Activity Report. After issuing the CPE letter, HFMA National updates the CPE portion of the member's record.

## **Frequently Asked Questions about HFMA's Certification Program** (Updated January 2007)

**Q: What are the benefits of becoming a Certified Healthcare Financial Professional (CHFP) or Fellow of the Healthcare Financial Management Association (FHFMA)?**

**A:** CHFPs and FHFMA are more likely to be considered qualified for higher-level positions in the healthcare finance industry. They are also generally viewed more favorably for advancement and job retention during downsizing situations.

### ***Certified Healthcare Financial Professional (CHFP) Program***

**Q: What are the requirements for becoming a CHFP?**

**A:** To become a CHFP, you must be a HFMA member for a total of two years; have two years of healthcare financial management experience; receive passing scores on the HFMA Core and one specialty exam; have completed a minimum of 60 semester hours at an accredited college or university; and provide required references. A notarized application must be submitted with the processing fee within 2 years of passing the first exam.

**Q: If I passed both exams, do I need to apply for certification?**

**A:** Yes. Successful completion of the exams is only one requirement to be certified. You must complete all other requirements prior to submitting a conforming CHFP application available on line at hfma.org.

**Q: I am already certified and want to add another specialty to my credentials. Do I need to retake the Core exam?**

**A:** No. If you maintain your certification, it is not necessary to retake the Core exam. For any additional specialties, complete and submit the exam application with appropriate fees. The specialty will be granted upon successfully completing the exam and applying for the additional specialty. The exam application is located on line.

### ***Certification Exam Preparation Resources***

**Q: I'm interested in taking the CHFP exam. What resources are available to prepare for the exam?**

**A:** A self-study course has been written specifically to prepare you for each of the exams. The certification exam questions are based on content covered in the current version of the self-study courses, which are updated every two years. (The expiration date is printed on the materials.) Review questions contained in these courses are different from those on the certification exam. Also, HFMA National offers coaching/review courses at ANI. Chapter resources for exam preparation vary by chapter and may include a locally sponsored coaching course, and shared library resources. Check with your chapter for more information on what resources are available locally.

**Q: How can I order the courses?**

**A:** They can be ordered on line at hfma.org under the CHFP section of the certification area. These courses expire on the date printed in the study guide.

**Q: Will I receive CPE for completing the self-study courses?**

**A:** The print self-study courses are CPE eligible based on the National Association of State Boards of Accountancy (NASBA) standards. CPE is awarded when you complete the 2007-2008 course prior to the December 31, 2008 expiration date, submit required documentation, and meet stated minimum requirements.

- Core program – 16.5 CPE credits
- Accounting and Finance – 15.0 CPE credits
- Patient Financial Services – 12.5 CPE credits
- Financial Management of Physician Practices – 11.5 CPE credits
- Managed Care – TBD

Be advised that the CPE requirements may differ by jurisdiction and the candidate is responsible for consulting with their reporting jurisdiction.

## Frequently Asked Questions about HFMA's Certification Program (Updated January 2007)

**Q: What is the best way to prepare for the exams?**

**A:** Become familiar with the content covered on the exam by completing the corresponding self-study course for the exam that you will be taking. Read the objectives at the beginning of each chapter. They define what you should know as a result of completing the chapter and its activities. Complete the review activities at the end of each chapter and the end-of-course test to assess how well you know the content covered in the course. Find others who will be taking the exam and study together. Check with your local chapter if any such study groups have been set up. Allocate your review time for the chapters according to the percentage of test questions on the exam that will come from that chapter. The exam questions are allocated as listed in the chart at hfma.org.

### **Certification Exam**

**Q: Where and how is the CHFP exam administered?**

**A:** HFMA's exams are administered via the Internet. They are administered locally and are proctored by an approved, certified HFMA member. The exams are also available with advance registration at the Annual National Institute (ANI). Approved proctors and exam dates/locations are listed at hfma.org under the Certification section of the certification area.

**Q: How do I sign up for an exam?**

**A:** When you are ready to take the exam, contact an approved proctor and establish a mutually agreeable date. An application for the exam must be submitted at least 10 business days in advance of the scheduled exam date and include the name of the proctor, the scheduled date of the exam, and the appropriate fee. There is a \$125 fee for the Core exam and \$100 for each specialty exam. You must complete the exam within one year of submitting the application or the fee will be forfeited. You will then be required to submit a new application with the appropriate fee. An on-line exam application form is available on line.

**Q: How do I know that HFMA has received my application and I am scheduled to take the exam as requested on the application?**

**A:** You will know that your exam application has been processed and you are approved to take the exam when you receive an e-mail approximately three business days prior to the scheduled exam containing the password needed to access the exam. Your proctor is also issued a password. These passwords are unique and time sensitive, being good only on the day of the scheduled exam.

**Q: Do I need to take both exams at the same time?**

**A:** No. It doesn't matter when or in what sequence you complete the Core and one of the specialty exams, as long as you successfully complete both within 24 months of each other. If you chose, you may complete the exams on the same day, two different days, the Core exam first or the specialty exam first. Your level of preparedness should drive when you complete the exams. The exams are always based on the current version of the self-study materials.

**Q: When will I know if I successfully completed an exam?**

**A:** You receive your results immediately after submitting your response to the last set of questions on the exam. You are provided your overall score only and will NOT receive detail on how you performed on individual questions or sections of the exam. You will also receive an e-mail confirmation generated through the testing system.

## Frequently Asked Questions about HFMA's Certification Program (Updated January 2007)

**Q: What happens if I do not successfully complete an exam?**

**A:** You must wait 90 days to retake the exam and then complete the same application process you completed originally, including paying the appropriate fee. You can continue retaking the exam until you successfully complete it. Be advised that the exam is always based on the current version of the self-study materials and if your retake crosses over versions of the exam, you may be taking an exam based on a current version of the course. Both exams must be successfully completed within 24 months of successfully completing the first exam.

**Q: I know I must pass the Core exam and one Specialty exam to be certified. What happens if I pass only one of the exams?**

**A:** You will be in a "conditioned" status and will not have to retake the exam you have successfully completed unless you exceed the 24-month period in which both exams must be passed. Assuming all other requirements for certification have been met, the exam that you must retake must be successfully completed within 24 months of taking the first exam in order to be eligible to attain CHFP status.

**Q: I was just notified that I passed the exams and I submitted an application attesting that I fulfilled all other requirements to become a CHFP. When will I receive my certificate?**

Applications are batch processed. Certificates are signed by various individuals and are typically sent to the chapters for distribution about every 60-90 days. Please be advised that HFMA National does not mail certificates directly to the newly certified member. They are sent to the chapter president for distribution in a manner of their choice.

### ***Fellow of HFMA (FHFMA)***

**Q: What are the requirements for becoming a FHFMA?**

**A:** To become an FHFMA, you must be a member of HFMA for at least a total of five years; hold the CHFP designation; have a bachelor's degree or 120 semester hours of college credit from an accredited education institution; meet the volunteer activity requirement, and provide favorable references. You must then submit to HFMA National a conforming, notarized application with the processing fee.

**Q: I've been a CHFP and am interested in becoming a Fellow. What do I need to do?**

**A:** First, determine if you have met all of the requirements for becoming a Fellow. If you have, submit a notarized application with the processing fee. HFMA National reviews the application to ensure all requirements have been met. This application is available at hfma.org under the Fellow section of the certification area. Applicants not meeting the requirements will be refunded the processing fee.

**Q: What volunteer activities would meet that requirement to earn the FHFMA designation?**

**A:** You must meet *one* of the following to fulfill the volunteer requirement for becoming a FHFMA within three years prior to submitting the FHFMA application:

- Earn the Follmer Bronze award
- Using the current Founders point system, earn a minimum of two points per year in two consecutive years and within three years prior to submitting the FHFMA application.
- Volunteer service for two years in a healthcare industry organization 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 – within three years prior to submitting the FHFMA application. A written report of the activities and verification are required.

**Q: How can I earn the Founders Points toward achieving the volunteer activity requirement?**

**A:** Founders points are earned for completing volunteer activities within HFMA such as being an HFMA chapter or National committee member or officer, writing or reviewing HFMA articles/publications, speaking at HFMA chapter or National events, or proctoring HFMA certification exams. Founders Point categories and point allocations are listed on the HFMA web site at hfma.org.

## Frequently Asked Questions about HFMA's Certification Program (Updated January 2007)

### **Maintaining designations**

**Q: Once I earn my CHFP or FHFMA designation, how long will I retain this designation?**

**A:** You will retain the designation as long as you remain an active member of HFMA and meet professional development maintenance requirements every three years after earning the designation. The requirements include earning 90 contact hours every three years (based on 50-minute contact hour) for a three-year cycle, with a minimum of 20 contact hours per year and a minimum of 45 contact hours per reporting period in the field of healthcare finance. The reporting period begins June 1 the year after the designation is earned and ends May 31, three years later.

One contact hour is 50 continuous minutes of an educational activity covering topics in healthcare, finance, management skills, and professional development, less breaks, meals and social activities. Only structured education activities count toward the maintenance requirement and include those listed at hfma.org under the Maintaining My Certification section of the certification area.

**Q: How do I determine the number of contact hours for a program?**

**A:** Add the total length of the education event in minutes, subtract breaks, meals, networking activities, etc. and divide that total by 50. Round that number down to the nearest half hour.

**Q: How will HFMA National know that I have met these requirements?**

**A:** You are responsible for keeping current your on-line record of all eligible activities that you participate in with the exception of HFMA National sponsored education events for which you received a CPE letter from HFMA National. You are also responsible for entering into your record activities that you attend locally through your chapter and programs sponsored by your employer, other professional activities, etc. Your chapter is not responsible for this. Enter your education activities into your education record at hfma.org under the Maintaining My Certification section of the certification area.

**Q: How do I know when I need to maintain my designation?**

**A:** Your on-line record indicates your next maintenance due date. It is labeled as your "good thru" date. Also, the year in which you are due to maintain, HFMA National will send e-mail notices to you requesting you to ensure accuracy and completeness of your education record.

**Q: Do I also need to send in an application of evidence of meeting the maintenance requirements?**

**A:** A hard copy application does not need to be sent to HFMA National. By updating your on-line education record, you are attesting to the accuracy and completeness of your record and agreeing to abide by the HFMA Code of Ethics. HFMA National reserves the right to audit records and require that all deficiencies be removed in order to retain the designation.

### **For more information...**

**Q: Whom should I contact for more information about the HFMA Certification Program?**

**A:** Send inquiry to certification @hfma.org, call your local chapter certification contact person., or contact a member of the HFMA National Certification team at 1-800-252-4362, ask for certification, or send an e-mail to [certification@hfma.org](mailto:certification@hfma.org)

# NOTES

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