

## 2013-14 Davis Chapter Management Year Chapter Acknowledgement Report For Period 5/1/2013 - 4/30/2014

**Chapter Type:** S  
**Size Level:** 1  
**Start Count:** 141  
**Current Count:** 155

**Region: 02**  
**079 - Puerto Rico Chapter**

Chapter Requirements	Completed	Due Date
Chapter Balanced Score Card Review	☑	6/1/13
Annual Educational Program Plan	☑	6/1/13
Chapter Verification Forms (Budget/Board/ByLaws/Website)	☑	7/1/13
Founders Award Maintenance	☑	7/1/13
Annual Financial Review	☑	8/1/13
IRS Form 990	☑	8/1/13
Fall Presidents Meeting	☑	9/30/13
Membership Satisfaction Survey (Participate)	☑	11/30/13
Chapter Leadership Roster	☑	3/1/14
Leadership Training Conference	☑	4/30/14

Educational Programming	YTD	Last Yr YTD	Last Yr Total
	No. of Chapter Events	14	12
HFMA National Event Entries	80	65	65
Live Learning /eLearning Center Attendance	8	6	6
Member Attendance	457	314	314
Non Member Attendance	405	327	327
Total Registrant Hours	4,403.0	3,667.7	3,667.7
Registrant Hrs. / Member	31.2	29.1	29.1

Chapter Newsletters	YTD	Last Yr YTD	Last Yr Total
	No. of Newsletters (Min. 1 per quarter)	4	4

CBSC Education Goal	Registrant Hours	Registrant Hrs. Member
	2,270.1	16.1

Awards of Excellence for Education			
Goal		Selected Yr. Mbr YTD	Last Yr. YTD
Sister Mary Gerald Bronze Award	>=16.1 < 18.0 RegHrs/mbr	31.2	29.1
John M. Stagl Silver Award	>=18.0 < 20.1 RegHrs/mbr		
Charles F. Mehler Gold Award	>=20.1 < 26.3 RegHrs/mbr		
Platinum Award	>=26.3 RegHrs/mbr		

C. Henry Hottum Award for Educational Performance Improvement		
Goal	Hours needed for Hottum	% toward achievement
Greater than 6.0% Increase = 3887.7	-515.3	113.3%

Awards of Excellence for Certification		# of Passed Exams
Goal		
Bronze:	2	0
Silver:	3	
Gold:	4	

Awards of Excellence for Membership Growth and Retention		Membership Growth to CBSC Goal
Goal		
To achieve this award membership growth and retention for the year must be:		
Bronze:	>=0.5%; < 1.5% above CBSC goal	10.7% *
Silver:	>=1.5%; < 2.5% above CBSC goal	
Gold:	>=2.5% above CBSC goal	
The CBSC Membership Goal is		140
*Note: This figure may fluctuate throughout the year		

Chapter Types: LM - Large Metropolitan Chapter SM - Small Metropolitan Chapter R - Rural Chapter S - Statewide Chapter SR - Statewide / Rural Chapter  
 Size Levels 1 = 0-176 2 = 177-250 3 = 251-450 4 = 451-700 5 = 701-1000 6 => 1000 members  
 Certification Exams (passed and taken) are counted monthly.

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**Educational Programming**

Start Date	End Date	Running Time	Mbrs	Non Mbrs	Total Attend	Reg. Hours	Program Title
<b>Chapter Events</b>							
5/19/13	5/20/13	5.0	4	0	4	20.0	Region 2 Mini LTC
5/31/13	5/31/13	5.0	44	9	53	265.0	Financing for Healthcare Facilities
6/7/13	6/7/13	6.0	5	74	79	474.0	HIT & HIE
7/13/13	7/13/13	5.0	14	0	14	70.0	2013 PR Chapter Mini LTC
8/8/13	8/8/13	4.0	35	39	74	296.0	Changes to the contributory system of Puerto Rico
9/13/13	9/13/13	6.5	65	136	201	1,306.5	2013 Healthcare Update
10/9/13	10/11/13	13.5	3	14	17	229.5	Region 2 Fall Institute
10/9/13	10/12/13	2.0	28	37	65	130.0	PR Hospital Association Annual Convention
10/24/13	10/24/13	3.0	5	0	5	15.0	Green Hospitals Going Green Make Buisness Sense
10/24/13	10/24/13	3.0	6	0	6	18.0	CHFP Certification Coaching 2013- San Juan
10/30/13	10/30/13	3.0	7	2	9	27.0	CHFP Certification Coaching 2013- Ponce
11/14/13	11/14/13	4.0	24	0	24	96.0	Foro: Modelos de servicios de Contratación Directa
1/17/14	1/17/14	3.0	22	17	39	117.0	Changes to the contributory system of Puerto Rico
3/21/14	3/21/14	8.0	39	77	116	928.0	CPA Industry Forum
<b>Subtotals:</b>			<b>301</b>	<b>405</b>	<b>706</b>	<b>3992.0</b>	
<b>HFMA National Events</b>							
5/2/13	5/2/13	1.5	1	0	1	1.5	HFMA National ATC: RAT21 Performance Improvement, the Revenue Cycle, - 13AT21
5/7/13	5/9/13	21.0	1	0	1	21.0	HFMA National: HFMA's Memphis Seminars - 1302
5/9/13	5/9/13	1.5	1	0	1	1.5	HFMA National: HFMA's Chapter Leader Program Planning Tool Webinar - 13CHPAT11
5/23/13	5/23/13	1.5	1	0	1	1.5	HFMA National ATC: RAT25-Volumes Break Things - 13AT25
5/23/13	5/23/13	1.0	1	0	1	1.0	HFMA National: HFMA's Chap Lead IRS 990 Reporting Requirements Webinar - 13CHPAT
5/29/13	5/29/13	1.5	1	0	1	1.5	HFMA National ATC: RAT30-Challenges Transitioning to Accountable Care - 13AT30
6/13/13	6/13/13	1.5	1	0	1	1.5	HFMA National ATC: RAT23-How to Control Costly - 13AT23
6/16/13	6/19/13	1.0	1	0	1	1.0	HFMA National: HFMA's 2013 National Institute - 1320ANI ER4 King's Daughters Med
6/16/13	6/19/13	1.0	6	0	6	6.0	HFMA National: HFMA's 2013 National Institute - 1320ANI GEN2 Perseverance, Teamw
6/16/13	6/19/13	1.0	4	0	4	4.0	HFMA National: HFMA's 2013 National Institute - 1320ANI GEN4 Quiet: Harnessing t
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI A01 Legal Update: Mainta
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI A06 Sharp Grossmont Hosp
6/16/13	6/19/13	1.5	2	0	2	3.0	HFMA National: HFMA's 2013 National Institute - 1320ANI A08 EHR Incentives and t
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI A09 Building a Transpare

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6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI A10 Managing Payer Expec
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI A12 How Cross-Department
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI B01 The Road Ahead: Effe
6/16/13	6/19/13	1.5	3	0	3	4.5	HFMA National: HFMA's 2013 National Institute - 1320ANI B02 Transforming the Pay
6/16/13	6/19/13	1.5	2	0	2	3.0	HFMA National: HFMA's 2013 National Institute - 1320ANI B03 Credit Ratings and A
6/16/13	6/19/13	1.5	3	0	3	4.5	HFMA National: HFMA's 2013 National Institute - 1320ANI C06 Physician Cost Accou
6/16/13	6/19/13	1.5	2	0	2	3.0	HFMA National: HFMA's 2013 National Institute - 1320ANI C08 The Effect of Health
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI C11 Cox Health Systems J
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI C13 How a Pre-Service Ce
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI D02 The Changing Landsc
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI D06 How Banner Health Us
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI D07 Driving Financial Pe
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI D10 Reimbursement, Payme
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI E01 The Medicare 2013 Up
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI E03 Taxable Financings:
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI E06 How Standardized Dat
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI E12 Using Reporting Tool
6/16/13	6/19/13	1.5	3	0	3	4.5	HFMA National: HFMA's 2013 National Institute - 1320ANI F06 Accounting & Auditin
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI F07 Lessons Learned from
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI F12 Late Breaking Sessio
6/16/13	6/19/13	1.5	7	0	7	10.5	HFMA National: HFMA's 2013 National Institute - 1320ANI GEN3 Transitioning to Va
6/16/13	6/19/13	1.5	1	0	1	1.5	HFMA National: HFMA's 2013 National Institute - 1320ANI H08 How Reengineering Se
6/26/13	6/26/13	1.5	1	0	1	1.5	HFMA National ATC: RAT32-Health Information Exchanges - 13AT32
7/11/13	7/11/13	1.5	1	0	1	1.5	HFMA National ATC: RAT31-Taking Control of Purchased Services - 13AT31
7/18/13	7/18/13	1.5	2	0	2	3.0	HFMA National ATC: Five Ways Organizations Can Succeed Webinar - 13AT38
7/24/13	7/24/13	1.5	3	0	3	4.5	HFMA National ATC: RAT37-Understanding the Spectrum - 13AT37
7/25/13	7/25/13	1.0	1	0	1	1.0	HFMA National: HFMA's Chapter Leader Lost & Found Webinar - 13CHPAT16
8/8/13	8/8/13	1.5	2	0	2	3.0	HFMA National ATC: RAT41-High-Impact Service Contracts - 13AT41
8/20/13	8/20/13	1.5	3	0	3	4.5	HFMA National ATC: RAT50-Effectively Using KPIs to Measure and Improve - 13AT50
8/28/13	8/28/13	1.5	1	0	1	1.5	HFMA National ATC: RAT43-Transform Budgeting to Support Strategic Business - 13A
9/11/13	9/11/13	1.5	1	0	1	1.5	HFMA National ATC: RAT48-Understanding the Impact of Consumable Costs - 13AT48
9/12/13	9/12/13	1.5	1	0	1	1.5	HFMA National ATC: RAT45-Predicting the Unpredictable: Webinar - 13AT45
9/18/13	9/18/13	1.5	2	0	2	3.0	HFMA National ATC: RAT54-Medicare's Final IPPS Changes for FY2014 - 13AT54
9/24/13	9/24/13	1.5	1	0	1	1.5	HFMA National ATC: RAT52-CMS's Two Midnight Rule: - 13AT52
10/15/13	10/15/13	1.5	1	0	1	1.5	HFMA National ATC: RAT51-Assessing the Productivity and Financial Impact of ICD

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10/17/13	10/17/13	1.5	2	0	2	3.0	HFMA National ATC: RAT47-Control High-Cost Supplies - 13AT47
11/5/13	11/5/13	1.5	1	0	1	1.5	HFMA National ATC: RAT63-Groundwork for Bundled Payment Success - 13AT63
11/11/13	11/13/13	7.0	3	0	3	21.0	HFMA National: HFMA's San Antonio, TX Seminars - 1350 ADS1 20% Discount 1 Day o
11/11/13	11/13/13	7.0	3	0	3	21.0	HFMA National: HFMA's San Antonio, TX Seminars - 1350 ADS1 20% Discount 1 Day o
11/14/13	11/14/13	1.0	1	0	1	1.0	HFMA National: HFMA's Chapter Leader Certification Essentials Webinar - 13CHPAT2
11/21/13	11/21/13	1.5	2	0	2	3.0	HFMA National ATC: RAT67-Improve Planning Accuracy and Efficiency - 13AT67
12/5/13	12/5/13	1.5	1	0	1	1.5	HFMA National ATC: RAT55-HFMA's 2014 Final Rule Changes to OPPS and ASCs - 13AT5
12/5/13	12/5/13	1.0	1	0	1	1.0	HFMA National: HFMA's Chapter Leader Career Center Webinar - 13CHPAT24
12/12/13	12/12/13	1.0	1	0	1	1.0	HFMA National: HFMA's Chapter Leader Completing the Yerger Application - 14CHPAT
1/17/14	1/17/14	1.5	4	0	4	6.0	HFMA National ATC: RAT2-HFMA's Get Ready for the CHFP Exam - 14AT2
1/29/14	1/29/14	1.0	3	0	3	3.0	HFMA National: HFMA's Chap Leader Plan for Success Part 1 Webinar - 14CHPAT2
2/11/14	2/11/14	1.5	2	0	2	3.0	HFMA National ATC: RAT7-HFMA's Beyond ICD-10: Are Your Ready for What's Next - 1
2/12/14	2/12/14	1.5	2	0	2	3.0	HFMA National ATC: RAT3-HFMA E2 Learning: Helping Facilities Educate Staff - 14A
2/18/14	2/18/14	1.5	2	0	2	3.0	HFMA National ATC: RAT13 HFMA's Provider Panel Discussion: - 14AT13
2/19/14	2/19/14	1.5	1	0	1	1.5	HFMA National ATC: RAT10-HFMA's Integrated Patient Payment Platform - 14AT10
2/19/14	2/21/14	7.0	1	0	1	7.0	HFMA National: HFMA's New Orleans, LA Seminars - 1401 ADSFSD Seeding Complimenta
2/19/14	2/21/14	14.0	1	0	1	14.0	HFMA National: HFMA's New Orleans, LA Seminars - 1401 ADSFSD Seeding Complimenta
2/20/14	2/20/14	1.5	3	0	3	4.5	HFMA National ATC: RAT1-HFMA's How to Develop and Maintain Supply - 14AT1
2/26/14	2/26/14	1.5	1	0	1	1.5	HFMA National ATC: RAT9-HFMA Implications of Medicare's Physician Pay Modifier -
3/4/14	3/4/14	1.5	1	0	1	1.5	HFMA National ATC: RAT6-A Vendor Guide to HFMA's E2 Learning - 14AT6
3/6/14	3/6/14	1.0	1	0	1	1.0	HFMA National: HFMA's Chapter Leader Plan for Success Part 2 Webinar - 14CHPAT5
3/12/14	3/12/14	1.5	1	0	1	1.5	HFMA National ATC: RAT12-HFMA's 340B Federal Drug Discount Program - 14AT12
3/19/14	3/19/14	1.5	1	0	1	1.5	HFMA National ATC: RAT15-HFMA's Building a Successful Population Program - 14AT1
3/19/14	3/19/14	1.0	1	0	1	1.0	HFMA National: HFMA's Chapter Leader Yerger Submissions Webinar - 14CHPAT6
3/20/14	3/20/14	1.5	1	0	1	1.5	HFMA National ATC: RAT16-HFMA's Improve Patient Flow and Margins Webinar - 14AT1
3/25/14	3/25/14	1.5	2	0	2	3.0	HFMA National ATC: RAT14-HFMA's Identifying Cost Savings Opportunities Webinar -
4/16/14	4/16/14	1.5	1	0	1	1.5	HFMA National ATC: RAT28-HFMA's Cut Days in A/R and Reduce Cost-to-Collect - 14A
4/17/14	4/17/14	1.5	2	0	2	3.0	HFMA National ATC: RAT20-HFMA's Revenue Cycle Executives Roundtable - 14AT20
4/27/14	4/29/14	16.3	5	0	5	81.3	HFMA National HFMA's 2014 LTC: VOLS
4/27/14	4/29/14	16.3	1	0	1	16.3	HFMA National HFMA's 2014 LTC: 14-15 RE REE CATS
4/29/14	4/29/14	1.5	4	0	4	6.0	HFMA National ATC: RAT19-HFMA's Office of Inspector General's 2014 Work Plan - 1
<b>Subtotals:</b>			<b>135</b>	<b>0</b>	<b>135</b>	<b>351.0</b>	

**Live Learning /eLearning Center Attendance**

6/1/13	6/1/13	10.0	1	0	1	10.0	eLearning Center Session: Certification Healthcare Finance Core Curriculum S - C
7/1/13	7/1/13	1.0	2	0	2	2.0	Virtual Healthcare Finance Conference & Career Fair Session: WC1-What Leading Ru

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Date	Value	Count	Count	Count	Count	Description
7/1/13	7/1/13	1.0	2	0	2	2.0 Virtual Healthcare Finance Conference & Career Fair Session: WC2-Value Project S
7/1/13	7/1/13	1.0	1	0	1	1.0 Virtual Healthcare Finance Conference & Career Fair Session: WC3-NY Presbyterian
10/1/13	10/1/13	1.0	1	0	1	1.0 Virtual Healthcare Finance Conference & Career Fair Session: WE2-Engaging Clinic
10/1/13	10/1/13	1.0	1	0	1	1.0 Virtual Healthcare Finance Conference & Career Fair Session: WE3-Health Policy U
11/1/13	11/1/13	10.0	2	0	2	20.0 eLearning Center Session: Certification Healthcare Finance Core Curriculum S - C
2/1/14	2/1/14	1.0	2	0	2	2.0 Virtual Healthcare Finance Conference & Career Fair Session: WA1-Patient Financi
2/1/14	2/1/14	1.0	2	0	2	2.0 Virtual Healthcare Finance Conference & Career Fair Session: WA2-Measuring and M
4/1/14	4/1/14	1.5	1	0	1	1.5 eLearning Center Session: Transform Budgeting, Capital Planning - 13AT43A
4/1/14	4/1/14	1.5	1	0	1	1.5 eLearning Center Session: Managing the Transition - 13AT44A
4/1/14	4/1/14	1.5	1	0	1	1.5 eLearning Center Session: Understanding the Impact of Consumable Costs - 13AT48A
4/1/14	4/1/14	1.5	1	0	1	1.5 eLearning Center Session: Washington Health Care Legislative Recorded Webina - 1
4/1/14	4/1/14	1.5	2	0	2	3.0 eLearning Center Session: Identifying Cost Savings Opportunities - 14AT14A
4/1/14	4/1/14	10.0	1	0	1	10.0 eLearning Center Session: Certification Healthcare Finance Core Curriculum S - C
<b>Subtotals:</b>			<b>21</b>	<b>0</b>	<b>21</b>	<b>60.0</b>
<b>Total</b>			<b>457</b>	<b>405</b>	<b>862</b>	<b>4403.0</b>

**Chapter Newsletters**

Publication Date	Publication Title
07/31/2013	Tropical News
10/31/2013	Tropical News Sept 2013
01/31/2014	Tropical News Jan 2014
04/30/2014	Tropical News April 2014

**5 Year Chapter Awards History**

Award Date	Award Name
4/30/13	Award of Excellence for Education: Platinum
4/30/13	Award of Excellence for Membership Growth and Retention: Gold
4/30/13	C. Henry Hottum Award for Educational Performance Improvement
4/30/13	Helen M. Yerger Special Recognition Award Multi-Chapter - Education(2)
4/30/12	Award of Excellence for Certification: Bronze
4/30/12	Award of Excellence for Education: Charles F. Mehler Gold Award
4/30/12	Award of Excellence for Membership Growth and Retention: Gold
4/30/12	Helen M. Yerger Special Recognition Award Multi-Chapter - Education
4/30/11	C. Henry Hottum Award for Educational Performance Improvement
4/30/11	Helen M. Yerger Special Recognition Award Multi-Chapter - Collaboration

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4/30/11	Award of Excellence for Certification: Gold
4/30/11	Award of Excellence for Education: Charles F. Mehler Gold Award
4/30/11	Award of Excellence for Membership Growth and Retention: Bronze
4/30/10	Award of Excellence for Membership Growth and Retention: Gold
4/30/10	Award of Excellence for Education: John M. Stagl Silver Award
4/30/10	C. Henry Hottum Award for Educational Performance Improvement
4/30/10	Helen M. Yerger Special Recognition Award: Multi-Chapter Collaboration
4/30/10	Helen M. Yerger Special Recognition Award: Multi-Chapter Improvement
4/30/09	Award of Excellence for Education: Sister Mary Gerald Bronze Award
4/30/09	Bronze Award of Excellence for Certification
4/30/09	Helen M. Yerger Special Recognition Award: Multi-Chapter Education

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