

**Healthcare Financial Management Association**

**Certification Program  
Coaching Course Resources**



### Certification Program Coaching Course Resources

The HFMA coaching course structure includes comprehensive PowerPoint slides with instructor/lecture notes; participant guides for note-taking and exercises; and facilitator's guide including conducting training program tips. The materials provided may assist chapters in hosting training sessions. The coaching course focuses on key business concepts that candidates must know to earn the CHFP designation. The examination process requires successful completion of two examinations – the end of module I examination and the module II case studies.

HFMA provides a set of coaching materials and applicable resources to support certification prep-sessions:

1. Chapter Resources/Best practices
2. Facilitator Guide (separate attachment)
3. Facilitator Presentations (separate attachments)
4. Learner Guides (Key concepts guides in the programs) plus content outline
5. Coaching Course Evaluation form (separate attachment)

#### 1. Chapter Resources/Best practices

See below for some possible coaching/facilitation or faculty contacts. These chapter leaders are great resources for facilitation and may offer best practices if facilitation help is not needed. Some chapters have recorded sessions that are available on YouTube (request links via contact below). Fees may be associated with engaging as a facilitator.

- Sam King: [sjking@uci.edu](mailto:sjking@uci.edu) (Southern California Chapter) - CHFP
- Jeff Helton: [jeffrey.helton@ucdenver.edu](mailto:jeffrey.helton@ucdenver.edu) (Southern California Chapter) - CRCR, CHFP
- Christoph Stauder: [christophstauder@msn.com](mailto:christophstauder@msn.com) (Oregon Chapter) - CHFP
- Terry Brennan: [tmltab@cableone.net](mailto:tmltab@cableone.net) (Arizona Chapter) - CRCR
- Christine Fontaine: [Christine.Fontaine@waystar.com](mailto:Christine.Fontaine@waystar.com) (Florida Chapter) - CHFP, CRCR
- John Lloyd: [jlloyd@clearbalance.org](mailto:jlloyd@clearbalance.org) (North Carolina Chapter) - CHFP, CRCR
- Chris Johnson: [chris.johnson@atriumhealth.org](mailto:chris.johnson@atriumhealth.org) (North Carolina Chapter)
- Katie Tarr: [katie.tarr@lbmc.com](mailto:katie.tarr@lbmc.com) (Tennessee Chapter) - CHFP, CSBI, CRCR
- Courtney Guernsey: [courtney.guernsey@corewellhealth.org](mailto:courtney.guernsey@corewellhealth.org) (Michigan Great Lakes Chapter) - CHFP

*If you are aware of any chapter or region offering prep-courses not listed here, please send their information to [careerservices@hfma.org](mailto:careerservices@hfma.org) so we may update the resource list. Thank you.*

#### 2. Facilitator Guide

The facilitator's guide provides suggestions and tips for conducting the practicum. Fundamental to the success of the practicum is the facilitator's ability to articulate important issues, structure and manage participant reflection, elicit dialogue among all participants and manage the means for summarizing learning. Facilitating the Coaching Course: Tips for conducting an effective learning session can be found in the Facilitator's Guide on pages 11-13. This checklist is designed to provide practical guidance in facilitating the chapter coaching course. This information presents recommended "how-to's" for a successful coaching session.

The coaching course materials are aligned with the realities of the health care business. The CHFP certification is designed to provide the learning needed to understand the business context today. Professionals today need to understand the context that produces the numbers rather than just the numbers alone. This perspective is what a chapter coaching course must provide - an understanding of the business context. The Certified Healthcare Financial Professional (CHFP) certification program is structured as two modules:

- Module I: HFMA Business of Health Care®
- Module II: Operational Excellence

### 3. Facilitator Presentations

Short PowerPoint presentations have been developed to assist the facilitator in setting the stage for coaching course sessions. The coaching course is a flexible and easily customizable structure. The presentations can be adjusted as needed depending on the delivery method; virtual vs. in-person. The PowerPoints are intended to introduce and/or summarize key topics, as identified by HFMA, but can be altered as determined by the presenter (highlight one or more specific topics, a specific section(s) of the online materials, area of expertise, etc.).

The presentation (PowerPoint) materials are arranged to review the following topics:

- I. Module I Introduction
  - Course 1 - The Big Picture
  - Course 2 - Financial Accounting Concepts
  - Course 3 - Cost Accounting Principles
  - Course 4 - Strategic Financial Issues
  - Course 5 - Managing Financial Resources
  - Course 6 - Looking to The Future
- II. Module II Overview

The materials provided may be used in any order and across any length of time. The materials may be expanded, combined or certain components omitted to address local market issues.

HFMA CHFP Coaching Course	
<b>Model</b>	Training class
<b>Intended Audience</b>	Industry professional –payers, physicians, providers <ul style="list-style-type: none"> <li>• Early careerists</li> <li>• New to field</li> <li>• Those seeking to advance into management</li> <li>• Those who would like to develop their professional team</li> </ul>
<b>Objective</b>	Provide the learning needed to build business savvy in the health care industry
<b>Focus</b>	Understanding the business context that produces the numbers rather than the numbers along
<b>Methods</b>	Professional practitioners lead review of contemporary business industry, Q & A. Multiple sessions as needed
<b>Materials Available</b>	Comprehensive PowerPoint slides with instructor/lecture notes; facilitator instructions; participant guides for note-taking and exercises; facilitator’s guide with conducting a training program tips.
<b>Distribution</b>	All coaching course materials are available online in the Chapter Leader’s area, in the Certification Resources section
<b>Cost</b>	N/A

If you need access to the CHFP program modules to aid your presentation, please contact [careerservices@hfma.org](mailto:careerservices@hfma.org).

### 4. Learner Guides

The coaching course is a worthwhile experience for participants to the extent that they engage in the activities, are provided with the opportunity to raise questions, and encouraged to capture lessons learned, new insights. The participant’s key concept guides are an easy tool for assisting participants to obtain the most value from the class and take notes. The guides are available to download from the course and includes the course outline.

- HFMA Business of Health Care® Key Concept Guide: This guide is intended to assist your progression through the module by specifying important ideas, trends and practices that comprise the healthcare business environment. Candidates taking the time to use and/or customize this guide can develop a handy review tool. This guide consists of two sections for each course: learning exercises which are intended to provide practice in applying important ideas and concepts learned and key terms and concepts in a glossary format
- HFMA Operational Excellence Concept Guide: This learner's guide is intended to assist certification candidates in earning the Certified Healthcare Financial Professional (CHFP) designation by identifying the primary business challenges faced by providers, physicians and payers today. It is recommended that candidates preview the key-concept guide prior to working through the assessment. The time allowed for completion of this assessment is three (3) hours. This preview indicates the key business challenges that will be presented and attunes candidates to areas of professional practice that may be less familiar. The learner guide can then be used to focus additional outside reading and study on unfamiliar issues.

Need more details, have questions, or have a resource to share? Email [careerservices@hfma.org](mailto:careerservices@hfma.org).