hfma
healthcare financial management association

HFMA Certification Maintenance Information

Full rules, codes and examples for keeping your credential current.

A Renewal · p. 1 B Codes · p. 2 C Activities and help · pp. 3–4

CHFP	Certified Healthcare Financial Professional	**60 hours · 3 years · Membership**
FHFMA	Fellow of HFMA	**60 hours · 3 years · Membership**
EHRC	Executive of Healthcare Revenue Cycle	**40 hours · 3 years · Membership**

THE REQUIREMENTS

60 or 40 — **Contact hours per cycle**
60 for CHFP and FHFMA; 40 for EHRC.

20 — **Minimum from HFMA**
National, regional or chapter education.

3 — **Years per cycle**
The same for all three credentials.

Active — **HFMA membership**
Required for the entire cycle.

BEFORE YOU START

NASBA CPE credit vs. contact hours

Certification maintenance contact hours are the 60 or 40 hours you need to renew your CHFP, FHFMA or EHRC. This reference is about them.

NASBA CPE credit is official CPE awarded by HFMA National for qualifying national programs. It counts toward your CPA license and your certification.

Every reference to **self-reporting** in this guide means reporting contact hours. Self-reporting never turns an activity into NASBA CPE credit.

See your hours

Run a report at any time to see how many contact hours you have for your current cycle. Reports are available once you log in to the online reporting tool, which you can open from hfma.org/maintain; find them at the top of the tool's page.

SECTION A · RENEWAL, REPORTING AND CONTACT HOURS

How renewal works

1. **Earn**
   Complete eligible education tied to one of the six HFMA competency categories. Find programs at hfma.org/careerdevelopment/education.
2. **Track**
   Log each activity as you go, ideally in the Excel upload template. Keep proof of completion: a confirmation, quiz, test or evaluation.
3. **Report**
   Self-report contact hours in the online reporting tool, which you can open from hfma.org/maintain; they show as EDU. NASBA CPE from HFMA National CPE is recorded for you.
4. **Renew**
   At the end of your cycle, HFMA reviews your record. If you met both hour requirements and kept your membership active, you roll into the next cycle automatically and receive a confirmation notice.

Reporting step by step

Option 1 · Single entry

Best for reporting an activity right after you finish it.

1. Open the online reporting tool from hfma.org/maintain, sign in and choose single entry.
2. Complete every field. All fields are required.
3. Click **Submit**. Pressing Enter will not save your entry.

Option 2 · Spreadsheet upload

Best for tracking through the year and submitting together.

1. Download the Excel template from the reporting tool.
2. Enter your activities using the codes on page 2.
3. Keep the exact downloaded format, then upload it. Activities with an invalid entry in any field are not added to your record.

CPE + EDU = contact hours

Both count toward your 60 or 40 hours.

- **CPE** — **NASBA CPE credit.** HFMA National programs, recorded for you.
- **EDU** — **Self-reported contact hours.** Everything else, reported in the online reporting tool.

CPE + EDU = **Total contact hours**

Self-report contact hours for

- Chapter and regional events
- On-demand webinars and article reviews
- Eligible non-HFMA activities, including CPE earned through other providers
- HFMA National live webinars where you missed the checkpoints

Good to know

HFMA programs without CPE can still count. Chapter and region hours count toward your 20-hour HFMA minimum.

Codes and calculations

Spreadsheet upload reference and how to count your contact hours

SECTION B · SPREADSHEET CODES

Codes for each column

ACTIVITY

A	Group live
B	Presenter
C	Publication
D	Self-study

ACTIVITY TYPE

1	HFMA National
2	HFMA Chapter
3	Non-HFMA
4	HFMA Region

CATEGORY

1	Revenue cycle
2	Healthcare environment
3	Financial accounting
4	Financial management
5	Quality monitoring
6	Leadership

Before you upload

- Every field needs a valid entry, or the activity will not be added to your record.
- Activity type and Category both use numbers. Check you have them in the right columns.
- Include the first and last day of each program.
- Keep the template's exact format. Do not add, remove or rename columns.

Example entry

Activity	Activity type	Start date	End date	Event title	Location	Category	Total points
B	**3**	**2/1/2017**	**2/1/2017**	**Healthcare Fundamentals**	**New York, NY**	**4**	**10**
Presenter	Non-HFMA event	First day	Last day	Name of the program	City, state	Financial management	Contact hours

CALCULATING CONTACT HOURS

Attending

Minutes ÷ 50, not 60. Count session time only; leave out meals and breaks.

Self-study

Minutes ÷ 50, or the CPE published for the program.

Publication

Minutes invested ÷ 50 for writing or reviewing. Max 23 hours per cycle.

Presenting

(Talk + prep) ÷ 50. Prep up to 2× the talk. First time only. Earned hours for attending? Count prep only.

College course

15 or 10 hours per semester or quarter course. Max 30 per cycle. Contact hours only, not NASBA CPE.

Eligible activities

Attending and presenting: full rules, contact hours and who reports it

Must meet one of the 6 HFMA maintenance categories:

1 Revenue cycle · 2 Healthcare environment · 3 Financial accounting · 4 Financial management · 5 Quality monitoring · 6 Leadership

Activity	Rules	Examples	Contact hours	Maximum	Reporting
A · GROUP LIVE Learning with an instructor and other participants, in person or online in real time. Report live webinars here.					
College course	Accredited college or university (U.S. Department of Education or CHEA-recognized) on health care, finance, related technical skills or professional development. Counts as contact hours only, not NASBA CPE.	MBA, accounting or health care courses.	15 per semester course; 10 per quarter course	**30 hours per cycle**	Self-report · EDU
HFMA National live webinar	Live webinars on current and specialty topics. For NASBA CPE, respond to the checkpoints and attend the full session. Missed the checkpoints? Self-report for contact hours.	HFMA Virtual Conference, HFMA webinar series.	CPE as published	**No limit**	Automatic · CPE or Self-report · EDU
HFMA seminars and conferences	Programs offered by HFMA National.	Annual Conference, Revenue Cycle Conference.	CPE or contact hours as published	**No limit**	Automatic · CPE
Other HFMA meetings	LTC, regional and chapter meetings on technical topics. Excludes chapter or region operational updates and volunteer committee training at LTC.	Monthly chapter meetings, education institutes, applicable LTC sessions.	Minutes of relevant content ÷ 50	**No limit**	Self-report · EDU
Non-HFMA programs	Seminars, conferences and webinars from other organizations, institutions or vendors on topics such as healthcare finance.	AICPA, AHIMA, ACHE or AMA; employer programs not about company operations.	Minutes, excluding meals and breaks, ÷ 50	**No limit**	Self-report · EDU
B · PRESENTER First presentation only, prorated if shared. Product promotion and operational topics do not count.					
College course instructor	Teaching at an accredited college or university; first offering of the course only. Full-time instructors and professors are not eligible.	MBA, accounting or health care courses.	15 per semester course; 10 per quarter course	**30 hours per cycle**	Self-report · EDU
HFMA National program	Seminar instructor, conference presenter or panelist. If you received CPE for attending the conference, only prep time counts.	Annual Conference panelist; webinar presenter.	Session + prep up to 2× session	**No limit**	Usually CPE
Other HFMA programs	Instructor, presenter or panelist at a chapter or regional program.	Chapter or regional meetings.	(Session + prep up to 2×) minutes ÷ 50	**No limit**	Self-report · EDU
Non-HFMA programs	Presenter or panelist for other organizations. If you received contact hours for attending, only prep time counts.	AICPA, AHIMA or AMA programs; employer programs not about operations.	(Session + prep up to 2×) minutes ÷ 50	**No limit**	Self-report · EDU

Eligible activities

Writing and self-study: full rules, contact hours and who reports it

Activity	Rules	Examples	Contact hours	Maximum	Reporting
C · PUBLICATION Authoring or reviewing a professional publication. Capped at 23 hours per cycle, authoring and reviewing combined.					
HFMA National or chapter publication	Writing HFMA self-study material or an article for an HFMA publication, or reviewing HFMA materials as a content expert.	HFMA course materials, an article for hfm, a chapter newsletter article, a prepublication review.	Minutes invested ÷ 50	**23 hours, combined**	**Self-report · EDU**
Non-HFMA publication	Writing an article for a non-HFMA publication, or writing a manuscript.	An article for an AMA journal; a book on a healthcare finance topic.	Minutes invested ÷ 50	**23 hours, combined**	**Self-report · EDU**
D · SELF-STUDY Learning independently and online, without an instructor. Programs may include tests.					
HFMA e-learning	HFMA online self-study courses and on-demand webinars. Self-report on-demand webinars.	Business of Health Care, Certified Specialist programs, on-demand webinars.	CPE as published; on-demand webinars: minutes ÷ 50	**No limit**	**Self-report · EDU**
Non-HFMA self-study	Self-study or online programs from a provider other than HFMA.	Courses through HIMSS, AICPA and others.	Minutes ÷ 50, or provider's CPE	**No limit**	**Self-report · EDU**

Not eligible

- Networking or social events
- Personal development
- Employer programs on company operations
- Chapter or region operational updates
- Product promotion, as attendee or presenter

Keep proof

Save a confirmation, quiz, test or evaluation for every activity. Log the title, dates, provider and minutes as you go, so reporting is a quick upload.

HFMA vs. non-HFMA limits

CHFP and FHFMA: up to **40 of 60** hours non-HFMA. EHRC: up to **20 of 40**. At least 20 hours must come from HFMA. Report outside activities as activity type 3, Non-HFMA.

CPE, waivers and help

NASBA CPE for live webinars: to receive NASBA CPE credit for HFMA National live webinars, respond to the webinar checkpoints and attend the session for its full duration. If the checkpoints are not completed, CPE credit will not be awarded. However, you may still self-report the webinar for HFMA certification maintenance contact hours.

CPA license: NASBA CPE rules are separate from HFMA certification maintenance. Programs without HFMA CPE may still be accepted by your State Board. Visit nasba.org or call (866) 627-6286.

Waiver or extension: email careerservices@hfma.org before your due date.