Certification Maintenance Information

HFMA Maintenance Requirement for CHFP and Fellow of HFMA

HFMA CHFP and FHFMA credential renewal cycle is every three years. To renew your HFMA certification you must meet two requirements:

- Remain an active HFMA member
- Complete 60 hours* of eligible education activities every three years

*Continuing education activities must include a 20-hour minimum of HFMA [national/association], regional or local chapter education. A list of HFMA educational programs can be located here: https://www.hfma.org/career-development/education.html

Your educational activity will be reviewed at the end of the cycle and will update automatically to your next three-year recertification cycle if all requirements have been met. A confirmation notice will be sent out shortly thereafter.

Education Activity Reporting Tool Instructions

Please take time to update your education activities using the HFMA online reporting tool. The tool can be found here: www.hfma.org/maintain (certified member login is required to access the tool). There are two options for reporting activities:

- **Option 1: Single Entry**
  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. Do not hit return key as you must click SUBMIT to process this form.
- **Option 2: Multiple Entry via spreadsheet upload**
  For each education activity, enter the requested information using the code legend below. The correct code must be entered, and all fields completed for the activities to be added to your record. The spreadsheet can be used real-time or can be downloaded/saved to your desktop. Track your activities throughout the year and submit multiple activities at one time via the online tool. Note: Save the spreadsheet in the exact format downloaded for simple upload.

Legend:

Activity	Activity Type	Category
A for Group Live	1 for HFMA National	D for Revenue Cycle Function
B for Presenter	2 for HFMA Chapter	E for Healthcare Environment
C for Publication	3 for Non HFMA	F for Financial Accounting
D for Self Study	4 for HFMA Region	G for Financial Management
		H for Quality Monitoring
		I for Leadership

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Entry Sample:

Activity	Activity Type	Event Start Date	Event End Date	Event Title	Location	Category	Total Points
B	3	2/1/2017	2/1/2017	Healthcare Fundamentals	New York, NY	G	10

EDU and CPE - What is the difference?
Activities and/or programs for which you received CPE points from HFMA National do NOT need to be reported using the online reporting tool. All other activities (EDU points) must be reported via the online reporting tool, including HFMA local chapter events, regional events, article reviews, etc.

- **CPE points** are official NASBA approved HFMA CPE credits and are awarded by HFMA National for National meeting attendance (Annual conference, seminars, conferences, live webinars, etc.); an evaluation form must be completed for CPE to be awarded.
- **EDU points** are self-reported education activities using the online reporting tool provided for HFMA certified members only. Examples of self-reported activity: local chapter or regional events, on-demand webinars, article reviews, non-HFMA related eligible activities (may include non-HFMA CPE's earned via another organization or any local chapter or state offering approved Continuing Professional Education (CPE) credits.

What are Contact Hours?
Contact Hours = CPE or EDU. Both categories (CPE & EDU) of contact hours are totaled together for a final count of maintenance for our certified members. HFMA programs that do not offer CPE may be eligible toward HFMA certification maintenance activity points when self-reported.

Eligible Certification Maintenance Activities
The types of professional development activities and categories eligible toward the HFMA certification maintenance requirement are listed in the table below. Continuing education eligible for certification maintenance includes (but is not limited to): seminars or conferences, workshops, educational offerings sponsored by your employer, live and on-demand webinars and e-learning self-study courses. All activities should be related to one of the following HFMA competency categories:

- Revenue Cycle Functions
- Healthcare Environment
- Financial Accounting
- Financial Management
- Quality Monitoring
- Leadership

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The categories are very broad; a specific topic not listed here may fit in one of these areas. *Note: networking/social activities and programs offered by employers covering company operational*

Education Activity and Activity Types are listed in the table below. 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 completion confirmation, quizzes, test, or program evaluation.

Education Activity	Activity Type
Group internet based program. An educational process designed to permit a participant to learn a given subject through interaction with an instructor by using the Internet. (Submit in the online tool under "Group Live")	• HFMA Webinars • HFMA Other, e.g. chapter or regional meetings • Non-HFMA Webinars
Group live program. An educational process designed to permit a participant to learn a given subject through interaction with an instructor and other participants either in a classroom or conference setting.	• College Course • HFMA Seminars or Conferences • HFMA Other, e.g. chapter or regional meetings • Non-HFMA Educational Events
Self Study. An educational process designed to permit participants to learn independently, on-line, and without involvement of an instructor. Program may provide structured opportunities (i.e. tests) to assess knowledge and skills gained throughout the program.	• HFMA e-learning, e.g. on-demand webinars • Non-HFMA self-study or e-learning
Presenter. Delivering a structured learning event on a given subject that allows interaction with and between participants.	• College Course • HFMA National programs • HFMA Other, e.g. chapter or regional meetings • Non-HFMA Educational Events
Publication. Authoring or reviewing a professional publication for HFMA or other organization.	• HFMA National • Author HFMA Chapter • Non-HFMA

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Education Activity Descriptions

Group Live or Group internet based program Activity	Education Activity Description
College course	**Description**: 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. **Example**: Courses in an MBA program or accounting, healthcare, etc. **Contact Hours**: 15 hours per semester-long course or 10 hours per quarter-long course; must be self-reported. **Maximum allowed**: 30 hours per reporting period
*HFMA Webinar	**Description**: A webinar broadcast on current and specialty interest topics. Presenter is specialist in that field. **Example**: HFMA Virtual Conference, HFMA webinar series, etc. **Contact Hours**: Amount of CPE hours as published for the webinar. To receive CPE Credits for HFMA National live webinars you must participate in online polling during the webinar <u>and</u> complete the online program evaluation. HFMA National updates the CPE portion to the member's record. **Maximum hours allowed**: No limit
HFMA Seminars or Conferences	**Description**: Programs offered by HFMA. **Example**: HFMA Annual Conference, HFMA Revenue Cycle Conference, etc. **Contact Hours**: Number of CPE/contact hours as published for the given event. HFMA National updates the CPE portion to the member's record. **Maximum hours allowed**: No limit
HFMA other	**Description**: The HFMA LTC, regional or chapter meetings covering technical issues or topics. Does NOT include meeting updates related to operational aspects of a chapter or region, nor does it include specific volunteer committee training sessions at the LTC. **Example**: Regional meetings, monthly chapter or regional meeting, education institutes, LTC (if any applicable sessions), etc.; must be self-reported. **Contact Hours**: Relevant portion of meeting in minutes divided by 50; must be self-reported. **Maximum hours allowed**: No limit

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Non-HFMA Program	**Description:** Programs offered by other organizations, institutions, or vendors including seminars and conferences covering topics such as healthcare finance. Does <u>not</u> include networking/social activities or personal development programs. **Example**: Programs offered by employers <u>not</u> covering the company's operational issues, seminars offered by AICPA, AHIMA, ACHE, AMA, etc.; webinars sponsored by other organizations **Contact Hours:** Total length of session in minutes, excluding meals and breaks, divided by 50; must be self-reported. **Maximum hours allowed:** No limit
Presenter Activity	**Education Activity Description**
College course	**Description**: 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. Contact hours awarded only for the first offering of the course. Full-time college/university instructors or professors are not eligible to receive contact hours in this category. **Example:** Courses in an MBA program or accounting, healthcare, etc. **Contact Hours:** 15 hours per semester-long course or 10 hours per quarter-long course – for <u>first time only</u> of course; must be self-reported. **Maximum hours allowed**: 30 hours per reporting period
HFMA National Program	**Description**: 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 **Example:** Presenter at Revenue Cycle Conference, instructor, or panel member at the HFMA Annual Conference; webinar presenter **Contact Hours:** 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 is awarded automatically by HFMA National for qualifying presentations. **Maximum hours allowed:** No limit; must be self-reported.
HFMA Other	**Description**: Instructor, presenter, or panel member at chapter/ regional seminar, excluding presentations covering operational issues or product promotion **Example:** Chapter meetings or regional meetings **Contact Hours:** 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. Contact hours equal total time in minutes for the length of presentation, divided by 50; must be self-reported. **Maximum hours allowed:** No limit.

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Non-HFMA Program	**Description**: Presenter at a seminar or conference; panel member at programs offered by other organizations, institutions, or vendor that cover topics such as healthcare, finance, etc. Does NOT include topics on operational issues or product promotion **Example:** Programs offered by employers not covering the company's operational issues, offered by AICPA, AHIMA, AMA, etc. **Contact Hours:** For the first time only 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; must be self-reported. **Maximum hours allowed:** No limit.
Publication Activity	**Education Activity Description**
HFMA National or HFMA Chapter publication or reviewer	**Description:** Writing HFMA self-study training material, developing an article for an HFMA National publication. Reviewing training materials or HFMA publications for accuracy and completeness from a content expert standpoint **Example:** Writing HFMA course materials, article for HFM, article for chapter newsletter. Reviewing pre-published HFMA material. **Contact Hours:** The total number of minutes invested in the activity divided by 50; must be self-reported **Maximum hours allowed:** 23 hours total per reporting period combined for authoring and reviewing publications
Non-HFMA publication	**Description:** Writing an article for a non-HFMA publication or writing a manuscript **Example:** Writing an article for the AMA journal, writing a book on healthcare finance related topic **Contact Hours:** The total number of minutes invested in the activity divided by 50; must be self-reported **Maximum hours allowed:** 23 hours total per reporting period combined for authoring and reviewing publications
Self-Study Activity	**Education Activity Description**
HFMA e-learning	**Description:** HFMA on-line self-study programs (courses and webinars) **Example:** Assorted programs: HFMA Business of Health Care, Certified Specialist programs, etc. On-demand webinars*. **Contact Hours:** If CPE eligible, it equals the amount of CPE published. *For on-demand webinars, report the total number of minutes invested in the activity divided by 50.* **Maximum hours allowed:** No limit
Non-HFMA	**Description:** 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. **Example:** Courses as offered through the HIMMS, AICPA or others **Contact Hours:** 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; must be self-reported. **Maximum hours allowed:** No limit

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CPE Information

To receive NASBA CPE Credits for HFMA National live webinars you must participate in the checkpoints during the webinar <u>and</u> complete the online program evaluation within 2 business days. After 2 business days, online programs will be inactive, and you will not receive CPE Credit. HFMA will then add these activities to your HFMA education activities. If the online "checkpoint" was not completed, members must self-report for maintenance.

HFMA programs that do not offer HFMA awarded CPE credits may be accepted by your local State Board of Accountancy as education credit for your CPA license. Please contact your local State Board of Accountancy for more information regarding qualified programs and next steps. For information on how to contact your State Board of Accountancy, visit: https://nasba.org/licensure/maintainingalicense/ or call NASBA at (866) 627-6286.

Waivers and Extensions -To request a waiver or extension to your due date, please email your request to HFMA for consideration at careerservices@hfma.org in advance of your maintenance due date.