

OFFERED BY:



NATIONAL ASSOCIATION OF  
Community Health Centers



# Financial Operations Management, Level I (FOM 1)

This program has been recommended for 20.5 CPE credits in the "Specialized Knowledge" Category

**Delivery Method:** Group Live

**Prerequisites and or PreWork:** None

**Program Level:** Basic



**NACHC Trainings  
Are Green!**

For more information on how to access course materials, or download presentations, visit:

<http://nachc.org/trainings-and-conferences/>

## ACCOUNTING PROFESSIONALS (CPE)

The National Association of Community Health Centers, Inc. (NACHC) 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 submitted to the National Registry of CPE Sponsors through its website: [www.nasbregistry.org](http://www.nasbregistry.org).

NACHC is pleased to offer the Financial Operations Management, Level I (FOM 1) Seminar.

This seminar is designed to provide CEOs, CFOs, COOs, Controllers, Finance managers and accountants with an orientation to financial management, accounting principles, and terminology unique to health centers as well as an in-depth focus on managing the 330 grant, including the elements of the scope of services, budgeting, and reporting.

### Learning Objectives

By the end of this two-and-a-half-day training, the participants will be able to:

- Understand how to implement effective systems in the finance department for timely and accurate reporting of information.
- Explain the five elements of the 330 scope of service and how they influence health center finance and operations.
- Distinguish between approaches to developing an operational budget.
- Describe the key drivers of profitability in a health center.
- Identify the critical elements to accurately complete the Federal Financial FFR SF 425 and the Medicare Cost Report.

### Past Presenters:

**Jeffrey E. Allen, CPA**, Partner, BKD, LLP, Springfield, MO

**Curt Degenfelder**, Curt Degenfelder Consulting, Inc., Los Angeles, CA

**David C. Fields, CPA, CMA, CFM**, Partner, BKD, LLP, Springfield, MO

**Seattle, WA**  
**February 20-22, 2019**

### Renaissance Seattle Hotel

515 Madison Street  
Seattle, WA 98104  
Telephone: (206) 583-0800

### \*Training Pricing Information

- Early Bird Registration Fee: \$695 if received by February 5, 2019
- Regular and On-Site Registration Fee: \$795 if received after February 5, 2019

*\*Registration Fee includes continental breakfast, lunch, and snacks for morning and afternoon breaks.*

**Registration Cutoff Date (Last day to register online): February 12, 2019**

To register, online for this seminar, visit:  
[www.nachc.org](http://www.nachc.org) and click Trainings.

For questions or complaints, contact the Training and Technical Assistance Department at [trainings@nachc.org](mailto:trainings@nachc.org) or call (301) 347-0400.

# Training Information

## Who Should Attend?

We suggest that Health Center **CEOs, CFOs, COOs, Controllers, Finance managers and accountants** attend this regional training.

## Training Hotel Information

### Renaissance Seattle Hotel

515 Madison Street  
Seattle, WA 98104  
Telephone: (206) 583-0800

**Room Rates:** \$199/night, single/double (plus taxes)

**Hotel Reservation Cutoff Date: February 5, 2019**

*\*NACHC has negotiated a discounted rate of \$199 a night which will be honored until February 5, 2019 or until the block has sold out, whichever occurs first.*

**Online Registration Link:** [https://www.marriott.com/meeting-event-hotels/group-corporate-travel/groupCorp.mi?resLinkId=NACHC%20Training%20FOM%201%5Eeasm%60naanaar%60199.00%60USD%60false%602%602/16/19%602/25/19%602/5/19&app=resvlink&stop\\_mobi=yes](https://www.marriott.com/meeting-event-hotels/group-corporate-travel/groupCorp.mi?resLinkId=NACHC%20Training%20FOM%201%5Eeasm%60naanaar%60199.00%60USD%60false%602%602/16/19%602/25/19%602/5/19&app=resvlink&stop_mobi=yes)

*\* Please note, this link only works on computers, not on smart phones.*

### Tips:

- We encourage you to register and pay (by credit card) for this regional training and book your hotel accommodations on the same day. A confirmed hotel reservation **does not** guarantee a spot in the training. If you have not received confirmation for participation in the training, you will be responsible for any hotel cancellation fees.
- This training has a limited amount of seats and will sell out quickly.

## Airport, Parking and Taxi Information

The nearest airport is **Seattle-Tacoma International Airport (Airport code SEA)**. The airport is 15 miles away from the Renaissance Seattle Hotel. Another airport option is **King County International Airport/Boeing Field (Airport code BFI)**, located 6 miles away from the Renaissance Seattle Hotel.

The Renaissance Seattle Hotel does not provide shuttle service to/from the SEA or BFI airport. Feel free to utilize taxis at baggage claim, ride share services such as Uber and Lyft, or pre-schedule a ride from Super Shuttle.

The Renaissance Seattle Hotel offers valet parking at \$57 per day and on-site self-parking for \$45 per day.

## NACHC Trainings Are Green!



All materials for this training will be available on the **MyNACHC Learning Center** to be downloaded one week prior to the event or printed at your leisure. It will be your responsibility to download these materials to your electronic device and/or print copies if you would like to have them available in paper form. For more information on how to access course materials and download presentations, go to:

<http://nachc.org/trainings-and-conferences/>

*This project was supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under cooperative agreement number U30CS16089, Technical Assistance to Community and Migrant Health Centers and Homeless for \$6,375,000.00 with 39 percent of the total NCA project financed with non-federal sources. This information or content and conclusions are those of the author and should not be construed as the official position or policy of, nor should any endorsements be inferred by HRSA, HHS or the U.S. Government.*

# Financial Operations Management, Level I (FOM 1)

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## Agenda

### Day One

- 7:30am – 8:15am**     **Registration & Continental Breakfast**
- 8:15am – 8:30am**     **Welcome and Introduction to the Financial Operations Management, Level I Course**
- 8:30am – 10:00am**     **Introduction to Health Center Financial Management**  
This session will cover the history of health centers, including relevant financial issues. Specific focus will be placed on the benefits, requirements, and operating issues that are unique to health centers.
- 10:00am – 10:15am**     **Break**
- 10:30am – 12:30pm**     **Operating a Health Center Finance Department**  
The day-to-day supervision of a health center Finance Department requires certain systems to ensure that daily, weekly, and monthly reporting information is available. This session will focus on developing accounting systems and generating reports.
- 12:30pm – 1:30pm**     **Lunch (provided)**
- 1:30pm – 3:00pm**     **Health Center Scope of Service: 330 Grant, Medicare, Medicaid**  
This session will focus on the five elements of the 330 scope of service – sites, services, providers, service area, and target population – and how they influence health center finance and operations. We will also compare the Medicaid and Medicare scopes of service and the implications on health center changes in scope and reimbursement.
- 3:00pm – 3:15pm**     **Break**
- 3:15pm – 5:00pm**     **Federal Grants Management**  
This session addresses key elements of the grant application process in addition to changes resulting from HRSA's Compliance Manual Chapter 17: Budget. Additionally, participants discover best practices and recommendations to avoid common mistakes during the budgeting process. Discussion will include guidance on accounting for: budgeting, behavioral health integration, and the impact of each on quarterly and annual reporting, specifically the Federal Financial Reports to be filed in the Electronic Handbook and Payment Management System.  
The goal of this session is to help health center financial staff understand the health center budgeting and reporting processes and gain insight into the information HRSA / OIG / Financial Statement Auditors seek when reviewing a health center's financial records.

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## Agenda (cont.)

### Day Two

- 8:00am – 8:30am**     **Registration & Continental Breakfast**
- 8:30 am – 10:00 am**     **Federal Grants Management (cont.)**
- 10:00am – 10:15am**     **Break**
- 10:15am – 12:30pm**     **Budgeting & Profitability Within Health Centers**  
Health centers need to have positive bottom lines to fund growth and development. This session will show the link between budgeting and profitability and identify key drivers of the health center's bottom line.
- 12:30pm – 1:30pm**     **Lunch (provided)**
- 1:30 pm – 3:00 pm**     **Federal Grants Management (cont.) including Preparation of the Federal Financial Report (FFR)**  
In addition to step by step instruction on how to fill out and file the Federal Financial Report (FFR Form 425), this session also provides an outline that includes an understanding of its purpose and guidance on the information collected on the FFR form.
- 3:00pm – 3:15pm**     **Break**
- 3:15 pm – 4:00 pm**     **Preparation of Federal Financial Report (cont.)**
- 4:00 pm – 5:00 pm**     **Q&A/Wrap-up**

### Day Three

- 8:00am – 8:30am**     **Registration & Continental Breakfast**
- 8:30am – 10:30am**     **Understanding Reimbursement in Health Centers including Medicare Cost Reporting**  
There are unique aspects to how health centers must bill and receive payment for the services they provide. Explanations of how reimbursement for Medicare PPS, Medicaid, sliding fee scales, and other revenue streams operate are discussed. This session will also cover Medicare cost reporting including discussion on patient visits, reclassifications and adjustments, and the draft of the new Medicare Cost Report form.
- 10:30am – 10:45am**     **Break**
- 10:45am – 12:00pm**     **Understanding Reimbursement in Health Centers including Medicare Cost Reporting (cont.)**
- 12:00pm**     **Adjourn – lunch will not be provided**

## REGISTRATION FORM

# Financial Operations Management, Level I (FOM 1)

## PARTICIPANT INFORMATION

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City, State \_\_\_\_\_ Zip \_\_\_\_\_

Phone (\_\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_\_) \_\_\_\_\_

Dietary Needs (ex. Kosher, Vegetarian, Food Allergies, etc.) \_\_\_\_\_

## COST INFORMATION\*

### Financial Operations Management, Level I (FOM 1)

Early Bird Registration \$695 per person  
(if received by February 5, 2019) \$ \_\_\_\_\_

Regular and On-Site Registration \$795 per person  
(if received after February 5, 2019) \$ \_\_\_\_\_

\*Includes continental breakfast, lunch, and snacks for morning and afternoon breaks.

## PAYMENT INFORMATION *(Payment MUST be received with registration form.)*

Check (payable to NACHC)  MasterCard  Visa  American Express

Total amount enclosed \$ \_\_\_\_\_

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

Print name as it appears on credit card \_\_\_\_\_

Cardholder's signature \_\_\_\_\_

**Note: Registration is not final until NACHC confirmation is received. This may take up to two weeks from NACHC's receipt of REGISTRATION FORM. DO NOT mail or fax your forms after January 29, 2019.**



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515 Madison Street  
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### Three Ways To Register:



#### ELECTRONICALLY

Online registration is available. Go to [www.nachc.org](http://www.nachc.org) Click Trainings, find the date and name of the training and click "register now."



#### MAIL

Mail Registration to:  
NACHC Meetings/Acct. Dept.  
7501 Wisconsin Avenue  
Suite 1100W  
Bethesda, MD 20814



#### FAX

Send registration form with credit card information to (301) 347-0457. **Registration forms will not be processed without payment.**

**NOTE: DO NOT mail or fax your forms after January 29, 2019.**

**NACHC CANCELLATION POLICY:** All Cancellations must be in writing and must be received at NACHC on/before February 12, 2019.

- Cancellations received on/before February 12, 2019 will be assessed a \$100 processing fee.
- Cancellations received after February 12, 2019 are not refundable.
- Cancellations after the conclusion of the training are non-refundable.
- Substitutions are encouraged.
- "No Shows" are non-refundable.

To cancel your reservation, please send a request in writing to Training & Technical Assistance Department at [trainings@nachc.org](mailto:trainings@nachc.org)