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.

Faculty Trainers:

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

Charleston, SC  •  February 26-28, 2020
Attend In-Person or Virtually!

Courtyard Charleston Historic District
125 Calhoun Street
Charleston, SC 29401
Phone: (843) 805-7900

*Training Pricing Information

- Early Bird Registration Fee: $720 if received by February 12, 2020
- Regular and On-Site Registration Fee: $820 if received after February 12, 2020

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

Registration Cutoff Date (Last day to register online): February 19, 2020

To register, online for this seminar, visit: www.nachc.org and click Trainings & Events.

For questions or comments, contact the Training and Technical Assistance Department at trainings@nachc.org or call (301) 347-0400.
Who Should Attend?

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

Training Hotel Information

**Courtyard Charleston Historic District**
125 Calhoun Street
Charleston, SC 29401
Phone: (843) 805-7900

**Room Rates:** $179/night, single/double (plus taxes)

**Hotel Reservation Cutoff Date:** February 4, 2020

*NACHC has negotiated a discounted rate of $179 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/event-reservations/reservation-link.mi?id=1561560115134&key=GRP&app=resvlink](https://www.marriott.com/event-reservations/reservation-link.mi?id=1561560115134&key=GRP&app=resvlink)

**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 **Charleston International Airport (Airport code CHS)**, which is located 11.1 miles away from the Courtyard Charleston Historic District Hotel. Another airport option is **Charleston Executive Airport (Airport code JZI)**, which is located 12 miles away.

The Courtyard Charleston Historic District hotel does not provide shuttle service. 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 Courtyard Charleston Historic District hotel offers on-site self-parking at $25 per day.

NACHC Trainings Are Green!

All materials for this training will be available to download on the **MyNACHC Learning Center** one week prior to the event. 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:


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 62.3 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.
# Agenda

## Day One

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30am – 8:15am</td>
<td>Registration &amp; Continental Breakfast</td>
</tr>
<tr>
<td>8:15am – 8:30am</td>
<td>Welcome and Introduction to the Financial Operations Management, Level I Course</td>
</tr>
<tr>
<td>8:30am – 10:00am</td>
<td>Introduction to Health Center Financial Management</td>
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<tr>
<td></td>
<td>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. Curt Degenfelder, Curt Degenfelder Consulting</td>
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<tr>
<td>10:00am – 10:15am</td>
<td>Break</td>
</tr>
<tr>
<td>10:30am – 12:30pm</td>
<td>Operating a Health Center Finance Department</td>
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<td>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. Jeffrey Allen, BKD</td>
</tr>
<tr>
<td>12:30pm – 1:30pm</td>
<td>Lunch (provided)</td>
</tr>
<tr>
<td>1:30pm – 3:00pm</td>
<td>Health Center Scope of Service: 330 Grant, Medicare, Medicaid</td>
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<tr>
<td></td>
<td>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. Curt Degenfelder, Curt Degenfelder Consulting</td>
</tr>
<tr>
<td>3:00pm – 3:15pm</td>
<td>Break</td>
</tr>
<tr>
<td>3:15pm – 5:00pm</td>
<td>Federal Grants Management</td>
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<td></td>
<td>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, and Financial Statement Auditors seek when reviewing a health center’s financial records. David Fields, BKD</td>
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*Note: Topics and presenters are subject to change as of 2/19/20*
# Agenda (cont.)

## Day Two

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>8:00am – 8:30am</td>
<td>Registration &amp; Continental Breakfast</td>
</tr>
<tr>
<td>8:30 am – 10:00 am</td>
<td>Federal Grants Management (cont.)</td>
</tr>
<tr>
<td>10:00am – 10:15am</td>
<td>Break</td>
</tr>
<tr>
<td>10:15am – 12:30pm</td>
<td><strong>Budgeting &amp; Profitability Within Health Centers</strong>&lt;br&gt;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.&lt;br&gt;<em>Curt Degenfelder, Curt Degenfelder Consulting</em></td>
</tr>
<tr>
<td>12:30pm – 1:30pm</td>
<td>Lunch (provided)</td>
</tr>
<tr>
<td>1:30 pm – 3:00 pm</td>
<td>Federal Grants Management (cont.) including Preparation of the Federal Financial Report (FFR)&lt;br&gt;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.&lt;br&gt;<em>David Fields, BKD</em></td>
</tr>
<tr>
<td>3:00pm – 3:15pm</td>
<td>Break</td>
</tr>
<tr>
<td>3:15pm – 4:00pm</td>
<td>Preparation of Federal Financial Report (cont.)</td>
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<tr>
<td>4:00pm – 5:00pm</td>
<td>Q&amp;A/Wrap-up</td>
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## Day Three

<table>
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<tr>
<th>Time</th>
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</tr>
</thead>
<tbody>
<tr>
<td>8:00am – 8:30am</td>
<td>Registration &amp; Continental Breakfast</td>
</tr>
<tr>
<td>8:30am – 10:30am</td>
<td>Understanding Reimbursement in Health Centers including Medicare Cost Reporting&lt;br&gt;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.&lt;br&gt;<em>Jeffrey Allen, BKD</em></td>
</tr>
<tr>
<td>10:30am – 10:45am</td>
<td>Break</td>
</tr>
<tr>
<td>10:45am – 12:00pm</td>
<td>Understanding Reimbursement in Health Centers including Medicare Cost Reporting (cont.)</td>
</tr>
<tr>
<td>12:00pm</td>
<td>Adjourn – lunch will not be provided</td>
</tr>
</tbody>
</table>

*Note: Topics and presenters are subject to change as of 2/19/20*
Financial Operations Management, Level I (FOM 1)

PARTICIPANT INFORMATION

Name ____________________________________________
Title ____________________________________________
Email ____________________________________________
Organizatio n _______________________________________
Address __________________________________________
City, State ____________________________ Zip ___________
Phone (________) ______________________ Fax (________) ______________________
Dietary Needs (ex. Kosher, Vegetarian, Food Allergies, etc.) ______________________

Attendance Method (Check one)  □ Attend On-Site  □ Attend Virtually

COST INFORMATION*

Financial Operations Management, Level I (FOM 1)

Early Bird Registration  $720 per person
(if received by February 12, 2020)  $_______________

Regular and On-Site Registration  $820 per person
(if received after February 12, 2020)  $_______________

*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 ____________________________

To cancel your reservation, please send a request in writing to Training & Technical Assistance Department at trainings@nachc.org

NACHC CANCELLATION POLICY: All Cancellations must be in writing and must be received at NACHC on/before February 19, 2020.

- Cancellations received on/before February 19, 2020 will be assessed a $100 processing fee.
- Cancellations received after February 19, 2020 are not refundable.
- Cancellations after the conclusion of the training are non-refundable.
- Substitutions are encouraged.
- “No Shows” are non-refundable.

NATIONAL ASSOCIATION OF COMMUNITY HEALTH CENTERS

Three Ways To Register:

ELECTRONICALLY
Online registration is available. Go to 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 February 5, 2020.

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REGISTRATION FORM