Financial Operations Management Level 2
This program has been recommended for 14.5 CPE and 12.25 CEU in the “Specialized Knowledge” category.

**Delivery Method:** Group Live and Group Internet-Based

**Prerequisites and or Pre-Work:** At least five years of health center experience

**Program Level:** Intermediate to Advanced

**Duration of Training:** Two days

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**Financial Operations Management Level 2 (FOM 2)**

**February 21 – 22, 2024**

**Atlanta, GA**

**Hybrid Event**

NACHC’s Financial Operations Management (FOM) Training Workshops offer health center Chief Executive Officers, Chief Financial Officers, Chief Operating Officers, Controllers, Finance Managers, and accountants an exploration of grants management, budgeting, profitability, and Medicare cost reporting.

FOM 2 is the intermediate to advanced level workshop designed to provide mid-career level health center finance managers insight and understanding of the core qualities needed to approach the business aspects of financial operations, management, and service delivery.

This training will focus on the following CFO Competencies:

- Advanced Technologies (Level 3)
- Quality Management (Level 3)
- Leadership (Level 4)

*These competencies align with NACHC’s Value Transformation Framework (VTF), with detailed descriptions of knowledge and skill levels. NACHC resources are mapped to competencies in the TTA Catalog.*

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**Pricing Information**

- Early Bird Registration Fee: $875 if registration received by February 7, 2024.
- Regular Registration Fee: $975 if registration received after February 7, 2024.

Enjoy a 10% group discount for 3+ attendees from the same organization, whether virtual or in-person. Applies to Early Bird and Regular Registration rates for National Workshops after February 1, 2024.

Registration cutoff date (Last day to register online): February 14, 2024.

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**Hilton Garden Inn Buckhead**

3342 Peachtree Rd. NE | Atlanta, GA 30326

**Group Rate:** $139

**Hotel Reservation Cutoff Date:** January 31, 2024

NACHC has negotiated a discounted rate of $139/night from February 20 - 22, which will be honored until these dates or until the block has sold out, whichever occurs first.

**Instructions:** Book your room online.

**Tip:** We encourage you to register and pay (by credit card) for this 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.
# Financial Operations Management Training Workshop Level 2 (FOM 2)–Hybrid Event

**Presenters:**

Jeffrey E. Allen, CPA, Partner, FORVIS  
David Fields, Partner, FORVIS  
Greg Wolverton, FHIMSS, CSI Solutions  
Nicole Moscatelli, Managing Consultant, FORVIS  
Curt Degenfelder, Curt Degenfelder Consulting, Inc.  
Sherry Giles, MSM, PMP, Consultant

## Day One: February 21, 2024 Hybrid LIVE in Eastern Time (ET)

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Presenter(s)</th>
<th>CEUs</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 am–9:00 am</td>
<td>Breakfast</td>
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</table>
| 9:00 am–10:30 am | The Business of Community Health  
This session will provide insight and understanding of the core qualities needed for health centers to approach the business aspects of operations, management, and service delivery. | Curt Degenfelder, Curt Degenfelder Consulting | 1.8 CPE/1.5 CEU |
| 10:30 am–10:45 am | Break                                                                  |                                                                              |      |
| 10:45 am–12:00 pm | Operations Assessment  
Discover practical management and operating techniques health centers can use to maximize financial performance before, during, and after the patient visit process. | Curt Degenfelder, Curt Degenfelder Consulting | 1.5 CPE/1.25 CEU |
| 12:00 pm–1:00 pm | Lunch                                                                   |                                                                              |      |
| 1:00 pm–2:30 pm | Let Cash Flow: The Importance of Cash Flow Management  
This session will focus on the importance of cash flow analysis for decision-making purposes. This session will give you the skills you need to conduct liquidity and profitability ratio analysis, assess the impact that changes in costs have on financial statements and understand how these relate to a company’s financial targets. | Jeffrey Allen and Catherine Gilpin, FORVIS | 1.8 CPE/1.5 CEU |
| 2:30 pm–2:45 pm | Break                                                                   |                                                                              |      |
| 2:45 pm–4:00 pm | Management Reporting in Health Centers  
This session will outline the different levels of financial and operational reporting in health centers, based on the impact of each; and, examine their individual key performance indicators. | David Fields, Partner, FORVIS | 1.5 CPE/1.25 CEU |
| 4:00 pm–4:10 pm | Break                                                                   |                                                                              |      |
| 4:10 pm–5:25 pm | COVID Update  
This session will update the attendees on the ending of COVID funds and share best practices on moving forward strategically to be compliant with all COVID fund requirements. | David Fields, and Jeffrey Allen, Partners, FORVIS | 1.5 CPE/1.25 CEU |
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<th>Time</th>
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<th>Speaker</th>
<th>Sponsor/CEU Details</th>
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<tbody>
<tr>
<td>8:00 am–9:00 am</td>
<td>Breakfast</td>
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<tr>
<td>9:00 am–10:30 am</td>
<td>Using Technology to Manage Information</td>
<td>Greg Wolverton, CSI Solutions</td>
<td>1.8 CPE/1.5 CEU</td>
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<td>This session will review the technological state of information systems in health centers nationally, with specific reference to the accounting, billing, practice management, and electronic medical records systems. You will learn how systems can be used for maximizing seamless data flow among health center departments and sites. Additional attention will be paid to the need for health centers to leverage technology to better manage information.</td>
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<tr>
<td>10:30 am–10:45 am</td>
<td>Break</td>
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<tr>
<td>10:45 am–12:30 pm</td>
<td>Operational Issues Within Health Centers</td>
<td>Curt Degenfelder, Curt Degenfelder Consulting</td>
<td>2.0 CPE/1.75 CEU</td>
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<td>This session will review synergy between financial and operational processes.</td>
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<tr>
<td>12:30 pm–1:30 pm</td>
<td>Lunch</td>
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<tr>
<td>1:30 pm–3:00 pm</td>
<td>Managing the Care of Your Patients from the Payer Perspective</td>
<td>Nicole Moscatelli, FORVIS</td>
<td>1.8 CPE/1.5 CEU</td>
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<td>This session will provide valuable insight into the contracting world of managed care organizations and help health centers prepare and position themselves to respond effectively. We will also examine the various care models in the marketplace as payers hold providers accountable for the cost and quality of each patient's care.</td>
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<tr>
<td>3:00 pm–3:15 pm</td>
<td>Break</td>
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<tr>
<td>3:15 pm–4:05 pm</td>
<td>Introduction to Project Management for Health Centers</td>
<td>Sherry Giles, Consultant</td>
<td>0.8 CPE/0.75 CEU</td>
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<td>This session will provide an introduction to project management for health center finance managers, including an overview of the five project management process groups and ten knowledge areas.</td>
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Financial Operations Management Training Workshop Level 2 (FOM 2)

PARTICIPANT INFORMATION (Please duplicate for each registrant)

Name ________________________________
Title ________________________________
Email ________________________________
Organization __________________________
Address ______________________________
City, State ____________________________ Zip ____________
Phone (_____) __________________________ Fax (_____) __________________________

ATTENDANCE METHOD
(Check one) ☐ ATTEND ON-SITE ☐ ATTEND VIRTUALLY

COST INFORMATION

Financial Operations Management Training Workshop Level 2 (FOM 2)

Registration is based on a 100-participant availability each for in-person and virtual options or the indicated online registration cutoff date, whichever occurs first. *Enjoy a 10% group discount for 3+ attendees from the same organization, whether virtual or in-person. Applies to Early Bird and Regular Registration rates for National Workshops after February 1, 2024.

Early Bird Registration: $__________ $875 per person
(if received by February 7, 2024)

Regular Registration: $__________ $975 per person (if received after February 7, 2024)

*Registration cutoff date (Last day to register online): February 14, 2024.

PAYMENT INFORMATION

☐ 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 February 7, 2024.