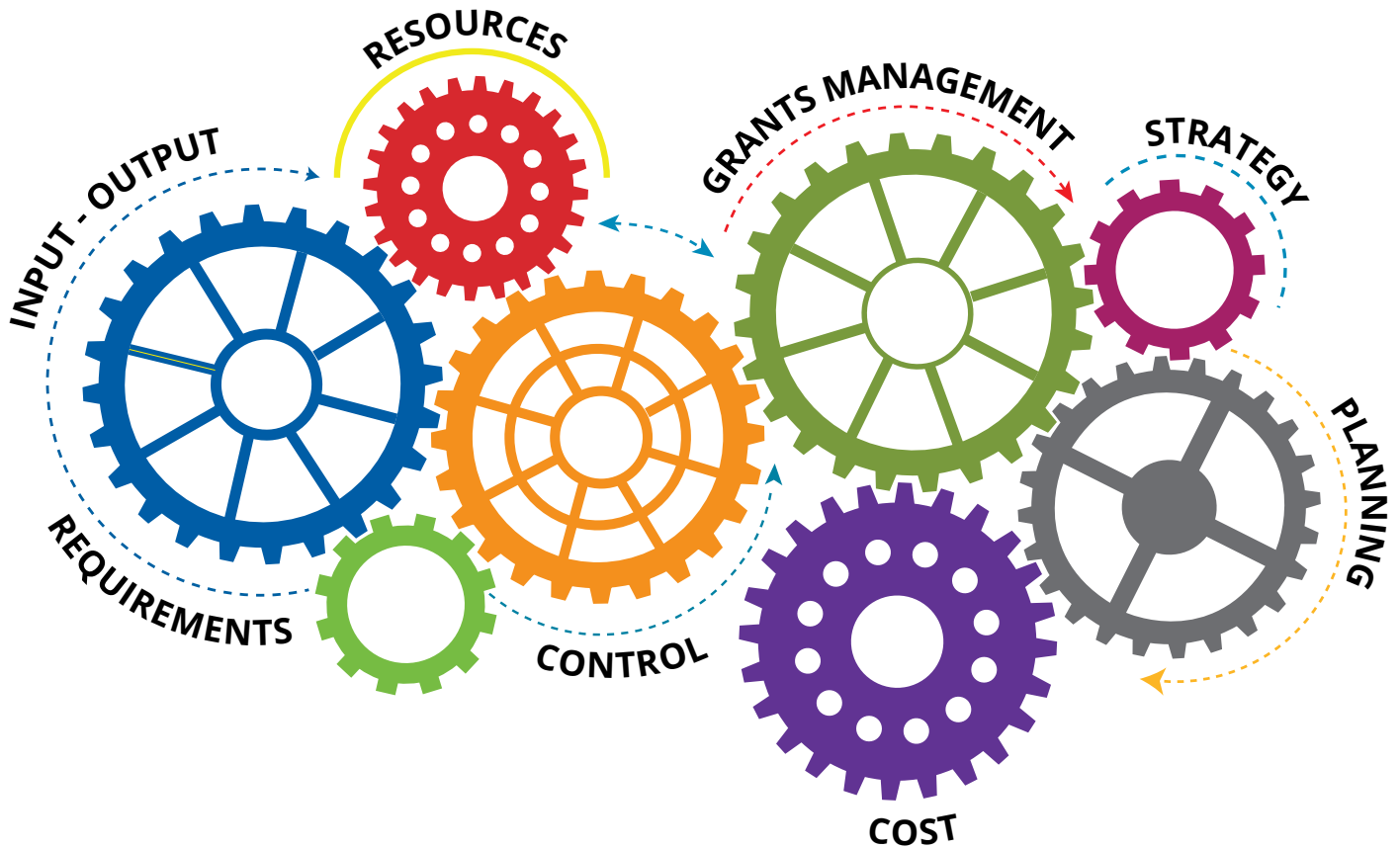




NATIONAL ASSOCIATION OF
COMMUNITY HEALTH CENTERS®



Financial Operations Management I

The Nuts and Bolts of HC Financial Operations



NATIONAL ASSOCIATION OF
COMMUNITY HEALTH CENTERS®

2026 TRAINING

Financial Operations Management I

The Nuts and Bolts of HC Financial Operations

March 25–26, 2026

VIRTUAL

This training will provide Continuing Education Unit (CEU) and Continuing Professional Education (CPE) credits. This program has been recommended for 11.0 CPE in the “Specialized Knowledge–Technical” category and 8.0 CEU.

Delivery Method:

Virtual

Prerequisites/Pre-Work:

Participants must have 3 years of experience at the supervisory or above level in reviewing transactions processed through the accounting ledger.

Program Level:

Intermediate

Duration of Training:

Two Days

Advance Preparation:

None

If you have any questions, please reach out to eventops@nachc.org.

2026 TRAINING

Financial Operations Management I

The Nuts and Bolts of HC Financial Operations

NACHC’s Financial Operations Management Training Workshop offers an intermediate-level exploration into essential financial operations for health centers, focusing on grants management, budgeting, profitability, and Medicare cost reporting. Designed for CEOs, CFOs, COOs, Controllers, Finance Managers, and accountants, this two-day training provides participants with the tools to enhance financial decision-making, streamline reporting processes, and strengthen financial sustainability. Attendees will delve into CFO Competencies, including Grant Compliance, Accounting and Finance Operations, and Business Communication, with a hands-on approach to real-world financial challenges facing Community Health Centers.

- ▶ **Operational Budget Development:**
Develop a comprehensive operational budget aligned with financial goals and compliance by completing a sample budget exercise.
- ▶ **Profitability Drivers:**
Identify and apply three key drivers of profitability using industry benchmarks to enhance financial performance.
- ▶ **Medicare Cost Report Mastery:**
Accurately complete a Medicare Cost Report, achieving 90% accuracy in a practice exercise.

This training will focus on the following CFO Competencies:

- Grant Compliance (Level 3)
- Accounting and Finance Operations (Level 3)
- Business Communication (Level 3)

March 25–26, 2026 • VIRTUAL

Pricing Information:

Member Rate: \$975

Non-Member Rate: \$1950

Registration Cut-off Date: March 13, 2026

To register online for these seminars, visit: www.nachc.org and click Trainings & Events. For questions, comments or complaints contact eventops@nachc.org or 301-347-0400



Day 1 • Wednesday, March 25, 2026

11:00 – 11:15 am **Intro**

11:15 am–12:30 pm **Grants Management, Health Center Policies, and Preparing the Federal Financial Report**

Effective grants management is crucial for the sustainability and compliance of Community Health Centers (CHCs). This session will guide participants through the essential elements of managing federal grants, with a specific focus on HRSA-funded programs. We will begin by exploring the policy guidelines outlined in HRSA's Financial Capacity Review document, providing participants with a clear understanding of the expectations and standards required for Health Center grants management policies. The session will also address other critical policy considerations that CHCs must navigate, ensuring they remain aligned with federal regulations. Participants will gain insights into common findings from HRSA site visits, learning from past experiences to avoid common pitfalls and enhance their readiness for HRSA Operational Site Visits. The session will conclude with a detailed walkthrough of preparing Federal Financial Reports (FFRs), ensuring that attendees are equipped with the knowledge and tools to meet reporting requirements accurately and efficiently.

David Fields, CPA, Partner, Forvis Mazars, LLP

12:30 – 1:30 pm **Lunch**

1:30 – 3:30 pm **Grants Management, Health Center Policies, and Preparing the Federal Financial Report, *continued***

Effective grants management is crucial for the sustainability and compliance of Community Health Centers (CHCs). This session will guide participants through the essential elements of managing federal grants, with a specific focus on HRSA-funded programs. We will begin by exploring the policy guidelines outlined in HRSA's Financial Capacity Review document, providing participants with a clear understanding of the expectations and standards required for Health Center grants management policies. The session will also address other critical policy considerations that CHCs must navigate, ensuring they remain aligned with federal regulations. Participants will gain insights into common findings from HRSA site visits, learning from past experiences to avoid common pitfalls and enhance their readiness for HRSA Operational Site Visits. The session will conclude with a detailed walkthrough of preparing Federal Financial Reports (FFRs), ensuring that attendees are equipped with the knowledge and tools to meet reporting requirements accurately and efficiently.

David Fields, CPA, Partner, Forvis Mazars, LLP

3:30 – 3:45 pm **Break**

3:45 – 5:00 pm **Focus on Indirect Costs: The Use of the De Minimis Rate or Negotiated Indirect Cost Rate Agreements with Federal Grant Funding**

During this session, we will delve into the intricate realm of indirect cost rate proposals and the pivotal role of negotiated indirect cost rate agreements (NICRAs) in regard to federal grant funding. Indirect costs are an essential component of federally funded projects, yet navigating the complexities of their determination can be daunting. This presentation aims to clarify the processes, challenges, and benefits associated with developing indirect cost rate proposals. Furthermore, it explores the advantages of securing a NICRA, emphasizing its potential to streamline administrative burdens. Attendees will gain valuable insights on how to improve indirect cost recovery mechanisms including the potential use of the De Minimis rate as an option over a NICRA.

David Fields, CPA, Partner, Forvis Mazars, LLP

Day 2 • Thursday, March 26, 2026

11:00 am – 12:00 pm **Medicare Cost Report**

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.

Jeff Allen, CPA, Partner, Forvis Mazars, LLP

12:00 – 12:20 pm **Break**

12:20 – 1:40 pm **Introduction to Value-Based Care**

Change in anything is often met with trepidation but change often brings opportunities. During this session we will review the fundamentals of value-based care and how it compares to the current reimbursement environment for FQHC's. We will also discuss the financial implications of value-based care and share how proposed changes can be a win-win for both patients and your financial statements. A discussion will occur on staffing priorities for value-based care along with financial opportunities and some pitfalls to avoid during the transition.

Steve Schwartz, CPA, Partner, CohnReznick
Dolores DiRe, Senior Manager, CohnReznick

1:40 – 2:00 pm **Lunch**

2:00 – 3:00 pm **Introduction to Value-Based, continued**

Change in anything is often met with trepidation but change often brings opportunities. During this session we will review the fundamentals of value-based care and how it compares to the current reimbursement environment for FQHC's. We will also discuss the financial implications of value-based care and share how proposed changes can be a win-win for both patients and your financial statements. A discussion will occur on staffing priorities for value-based care along with financial opportunities and some pitfalls to avoid during the transition.

Steve Schwartz, CPA, Partner, CohnReznick
Dolore DiRe, Senior Manager, CohnReznick

3:00 – 3:15 pm **Break**

3:15 – 4:30 pm **Budgeting and Profitability**

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. Learn about health center industry benchmarks and how to use them in your practice to better manage cost, productivity and revenue by establishing goals and objectives for budgeting and realization of better financial performance.

Steve Schwartz, CPA, Partner, CohnReznick



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.nasbaregistry.org. (Sponsor #108392)

REGISTRATION FORM

2026 TRAINING

Financial Operations Management I

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PARTICIPANT INFORMATION

Name _____

Title _____

Email _____

Organization _____

Address _____

City, State _____ Zip _____

Phone (_____) _____ Fax (_____) _____

COST INFORMATION*

Member Rate \$975 per person \$ _____

Non-Member Rate \$1950 per person \$ _____

* Registration closes March 13, 2026

PAYMENT INFORMATION

(Payment **MUST** be received with registration form.)

Check (payable to NACHC) MasterCard Visa American Express

Total amount enclosed \$ _____

Card Number _____ Exp. 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.*



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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
**Mail Registration by
February 5, 2026**



FAX

Send registration form with credit card information to (301) 347-0457.
**Fax Registration by
March 5, 2026**

NOTE: Registration forms will not be processed without payment.

ATTENDEE CANCELLATION POLICY:

All Cancellations must be in writing and must be received at NACHC on/before March 5, 2026.

- Cancellations received on/before March 5, 2026 will be assessed a \$100 processing fee.
- Cancellations received after March 5, 2026 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 the Training and Technical Assistance Department at eventops@nachc.org.

NACHC CANCELLATION POLICY:

If NACHC cancels or postpones a conference or online offering, NACHC will automatically issue a 100% registration refund.

For more information on our cancellation policies please contact our offices at 301-347-0400.