

**Healthcare Financial Management Association**  
**Certified Healthcare Financial Professional (CHFP)**  
**Certification Exam**

**Proctor Handbook of Policies and Procedures**

**Supports**  
**Questionmark Secure version 4.0 and higher**

**Updated August 2008**

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Updated August 2008

Information in this Proctor Handbook represents current technical requirements and test administration procedures for the HFMA certification exams. Information in this Handbook supersedes information contained in any prior versions of the Proctor Handbook or previously published information.

All proctors are accountable for information included in the handbook, abiding by the designated policies, and carrying out all designated policies as related to the candidate. HFMA and the Board of Examiners (the BoE), will review any reported or suspected breach of policy. Activities that compromise the HFMA Certification exam and/or testing process may result in actions against the candidate and/or proctor including, but not limited to, being barred from taking any HFMA certification exam and/or applying for certification, removal of designation if already certified, removal of membership in HFMA, and legal action. Proctors may be temporarily or permanently barred from proctoring any HFMA Certification exams, among other potential consequences.

The HFMA Board of Examiners (BoE) and HFMA reserve the right to change these policies. BoE members and others impacted by the change will be notified of the given change(s) within ten (10) days and will be accountable for knowing and complying with the most current published policies and procedures prior to proctoring the next examination scheduled after the ten (10) day notification period.

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## Thank You!

Thank you for volunteering to act as an exam proctor for the HFMA certification program.

Your generosity is appreciated, both by the candidates and HFMA. By offering to provide this service, you are helping HFMA members achieve certified status, while at the same time ensuring that the certification testing process is not compromised.

For each date you serve as a proctor, you earn one education point toward your certification maintenance requirements when self-reported in the on-line education reporting tool. You can earn up to a maximum of 12 points per three-year reporting period. You are also eligible to receive up to one Founders Point per award year.

The HFMA Board of Examiners also extends their thanks to you. They are responsible for overseeing the certification program including development of the self-study materials and the exams. They appreciate your support of the HFMA certification program.

### *Certification Program Contact Information:*

The Healthcare Financial Management Association

Attn: Career Services

Two Westbrook Corporate Center, Suite 700

Westchester, IL 60154

Website: [www.hfma.org/certification](http://www.hfma.org/certification)

Phone: (800) 252-4362, ask for certification

Fax: (708) 531-0665

e-mail: [certification@hfma.org](mailto:certification@hfma.org)

# HFMA Certification Examination Confidentiality Policy for Proctors Affidavit

I hereby attest that I will respect the confidentiality of HFMA certification examinations. I further attest that I will NOT:

- Divulge the nature or content of any HFMA certification examination question or answer under any circumstances except as required by law
- Engage in any unauthorized communication during the examination
- Refer to unauthorized materials or use unauthorized equipment during testing.
- Remove or attempt to remove any HFMA certification materials, notes or any other items from the examination room.

I understand that I am required to report to HFMA any examination disclosures or solicitations for disclosure of which I am aware. In addition, I understand that failure to comply with the confidentiality policy may result in the invalidation of examination results for which I proctored and disqualification from proctoring future examinations.

I understand that the content of the Certification Examinations is proprietary and strictly confidential information. I hereby agree that I will not disclose, either directly or indirectly, any question or any part of any question from an Examination to any person or entity. I further understand that the unauthorized receipt, retention, possession, copying or disclosure of any Examination materials, including but not limited to the content of any Examination question, before, during, or after the Examination may subject me to legal action. Such legal action may result in monetary damages and/or disciplinary action including denial or revocation of certification or recertification.

I furthermore attest that I have read and agree to abide by all policies and procedures as defined in the Proctor Handbook. I will also abide by any changes to the Policies and Procedures as subsequently communicated to me by HFMA and will be accountable for abiding by the most currently published Proctor Policies and Procedures Handbook. I hereby agree to hold HFMA, its officers, directors, examiners, employees, and agents, harmless from any complaint, claim, or damage arising out of any action or omission by any of them in connection with this application; the application process, any examination given by HFMA; any grade relating thereto; or any demand for forfeiture or redelivery of such certificate. I understand that the decision as to whether I qualify as a proctor rests solely and exclusively with HFMA and that the decision of HFMA is final.

I understand that I will be considered to be an approved proctor and allowed to proctor exams after the following requirements have been met.

- The HFMA chapter of which I am a member submits a recommendation for me to be a proctor, which I will obtain.
- HFMA approves that I am a certified member and in good standing.
- I have submitted a signed copy of this Affidavit to HFMA National.

I understand that I will remain on the list of approved proctors until I notify HFMA National in writing ([certification@hfma.org](mailto:certification@hfma.org)) that I want to be removed from the list. I approve my name and contact information to be posted on the HFMA web site certification area and available to exam candidates (members only) seeking to identify a proctor for the certification exam.

- Continued on next page -

**I HAVE READ AND UNDERSTAND THESE STATEMENTS and all content contained in the Proctor Handbook, and INTEND TO BE LEGALLY BOUND BY THEM. I attest that I will fully abide by all of the policies and procedures stated in this Handbook.**

Name: \_\_\_\_\_ (Please print)

Signature \_\_\_\_\_ (Required)

Member Number: \_\_\_\_\_ Chapter Number/Name: \_\_\_\_\_

Today's Date: \_\_\_\_\_

Chapter Officer Name \_\_\_\_\_ (Please print)

Chapter Officer Signature \_\_\_\_\_

To be eligible to serve as a proctor for the CHFP Certification Exam, return this form to HFMA Career Services:

Mail:

HFMA  
Career Services – Proctor Affidavit  
Two Westbrook Corporate Center  
Suite 700  
Westchester, IL 60154

Fax: (708) 531-0032, Attention Career Services

\* Please retain a copy of the signed Affidavit for your records.\*

Upon receipt of this affidavit, the approved proctor will be allowed to serve as a proctor for CHFP certification exam candidates. Certified members who wish to serve as a proctor must be an HFMA member in good standing, receive endorsement from their chapter, and submit this signed affidavit.

## 1. GENERAL TESTING INFORMATION

### Important policies to consider before proctoring:

- The Board of Examiners policy prohibits relatives of a candidate and individuals with direct reporting to or supervisory responsibilities for the candidate from serving as proctor.
- A proctor is not allowed to complete any exam for which they have served as a proctor to a candidate within the last six (6) months.
- Proctors must avoid all conflicts of interest and all appearances of a conflict of interest when exercising their duties as proctors. HFMA's Code of Ethics advises: "Avoidance of conflict of interest situations requires that a member not be part of a situation where judgment is impaired or can be influenced by conflicting goals." Proctors are prohibited from proctoring examinations for coworkers and relatives, and for individuals that others would prudently perceive as a conflict of interest.
- Proctors serving as a coaching instructor should not breach the confidentiality of an exam by disclosing to the coaching course participants specific questions or any information that would give participants of the coaching course an unfair advantage versus those who did not complete the course as part of the method to prepare for the exam.
- It is HFMA's policy not to disclose an individual's score or status on an exam (i.e., pass or fail) to anyone other than the candidate. HFMA National releases to HFMA chapters only the total number of passed exams per month, without ever releasing the names of the individual candidates. Candidates are not required to share their score with the proctor. Proctors are not allowed to share a candidate's exam score or status (i.e., pass or fail) unless explicit permission is received from the candidate. A candidate's exam score is considered confidential information.

### 1.1 Exam Application Process

1. The candidate must submit a completed exam application with appropriate non-refundable fees to National HFMA as indicated on the exam application. (Phone applications are not accepted and applications received without payment will not be processed.) On this application, the candidate must identify the HFMA-approved proctor's name and the mutually agreed upon date on which the candidate plans to complete the exam and the approved proctor is available to proctor it. HFMA is *not* responsible for assigning proctors, although it can provide assistance to candidates in identifying proctors located closest to the candidate's desired testing location.
2. The test date must be scheduled no sooner than 10 business days after HFMA National's receipt of the exam application to allow appropriate processing time. For payment made by check, allow an additional 10 business days for processing of payment and scheduling the exam date. Expedite processing (i.e., exam date requested is sooner than the 10 business day processing period for charge payment and 20 business days for payment by check) will be subjected to an administrative fee of \$25.
3. While the exam is available 24 hours of the day, technical support from HFMA National Career Services is available *only* during normal business hours of 8:00 am to 5:00 pm (CST) Monday through Friday, excluding holidays. Due to limited space, the HFMA National office (Westchester, IL) is not available for test administration.

4. HFMA is not responsible for errors in the candidate's application, e.g., incorrect exam date, wrong proctor, etc., and processes applications based on information provided on that exam application.
5. Candidates wishing to reschedule an exam must submit a written request (e-mail to [certification@hfma.org](mailto:certification@hfma.org)) at least two business days prior to the exam. (Phone requests for change of exam date will *not* be accepted.) Candidates submitting the request on shorter notice will forfeit the exam fee for the cancelled date and be required to submit a new application and appropriate fees. Candidates rescheduling more than twice will be assessed a \$25 processing fee.
6. Candidates who do not successfully complete an exam are required to wait a minimum of 90 days before retaking the exam. There is no exception to this policy of timeframe for retaking the exam.
7. Candidates who retake the exam must submit a new application with the appropriate fee and abide by all of the procedures required for applying for an exam. The candidate will need to arrange for and then indicate on the application when they will retake the exam and the name of the proctor. (Phone applications are not accepted.)
8. Candidates have 24 months to successfully complete the Core and a specialty exam from the date the first exam is successfully completed. There is no exception this policy of timeframe for successfully completing the exams as an eligibility requirement for becoming a Certified Healthcare Financial Professional (CHFP).

### ***Examinations for Individuals with Disabilities***

In accordance with the American with Disabilities Act (ADA), the BoE will allow reasonable modification of exam administration processes in circumstances where a determination has been made that a candidate's disabilities require departure from established testing protocol and where the accommodation will not affect exam validity and reliability. *A written request, including appropriate written medical verification of the disability and stipulated accommodations for the disability, must be submitted to HFMA National at least 30 days prior to scheduling an examination date with a chapter or proctor.* Requests will be handled on a case-by-case basis.

### **1.2 Exam Confirmation and Passwords**

1. The proctor and the candidate are each assigned a unique, time-sensitive password valid only on the scheduled exam date. If the wrong name of a proctor is provided on the exam application and another password is entered, the testing system will not work
2. The proctor and candidate each will be sent a confirmation message including the appropriate password via e-mail approximately three (3) business days prior to the scheduled exam date. (For a copy of the e-mail password notification sent to proctors, refer to Attachment A.)
3. Confirmation messages will be sent to the candidate and proctor's e-mail address as listed in their HFMA member profile. HFMA National is *not* responsible for undelivered passwords or related messages due to an invalid e-mail address in a member's record. It is the responsibility of each the candidate and proctor to ensure the e-mail address in their member profile is current and correct.
4. It is the responsibility of the candidate and proctor to ensure passwords are received in advance of the exam, and to contact HFMA National as appropriate if password is not received.
5. It is the responsibility of the candidate and the proctor to bring their respective passwords on the exam day.

## 2. Proctor Responsibilities Prior to Administering the Exam

### 2.1 Introduction

1. Make sure you have your password. If you have not received a confirmation message with a password and it is less than three business days to exam day, contact HFMA at [certification@hfma.org](mailto:certification@hfma.org).
2. Install Questionmark Secure and confirm functionality of the software at least two business days *prior* to administering an exam. Actual installation of the Questionmark Secure browser takes less than five minutes, but if something needs to be debugged or there are firewall issues, it can take longer. Allow time to work with your IT staff to resolve any potential technical problems. While you may not access the exam until the scheduled test date, you can install and test the browser in advance. See the “Installing Questionmark Secure” section for installation instructions and hardware/system requirements.

#### **Important policies related to hardware and software:**

- The proctor is responsible for ensuring the software and hardware is completely functional prior to the administration of the exam. HFMA does not assume responsibility for issues related to the testing environment, including the computer systems/networks used for administering the exams. The proctor is responsible for working with the local IT staff as necessary to resolve hardware, network or firewall issue that could impact the functionality of the test administration software. *Avoid situations that may cause additional stress for the exam candidate by allowing enough time to test full functionality of the browser in advance of the exam.*
- The exams will not download unless Questionmark Secure is installed properly. Install Questionmark Secure as directed in the “Installing Questionmark Secure” section of this Proctor Handbook.

3. Document any technical difficulties that occur during testing and send them in writing to [certification@hfma.org](mailto:certification@hfma.org). This helps HFMA National determine if problems are related to the hardware or software. Document computer, connection, or power-related problems as well as anything else the candidate might feel has affected the score they received. On an individual basis, HFMA National will determine what actions will be taken.

## 2.2 Minimum System Requirements

The following are the *minimum* requirements for proper installation the secure browser. All system requirements stated below must be met fully for the secure browser to be functional and exams to be administered from the computer. **If all of the system requirements cannot be met, the location should not be considered a viable testing location.** The proctor and candidate should identify alternative testing locations that will allow for the system requirements to be met completely.

Prior to installing Questionmark Secure as directed in the “Installing Questionmark Secure” section, review this list with your IT staff and confirm ALL of the following requirements can be met completely.

### System Requirements Checklist

- Microsoft Windows 98 or higher. The software is not supported for use with Windows 95.

Installing the Questionmark Secure browser with Windows XP requires the assistance of your network administrator. Windows XP has an “Install Shield” that prevents adding software without administrator permission. The network administration must turn this off or grant appropriate access.

- At least 5Mb of free disk space, though only about 1Mb is needed permanently.
- 100 mhz Pentium processor or greater.
- 64 Mb of RAM.
- The latest version of Sun Java Virtual Machine. (Available from [www.java.com](http://www.java.com)) The use of Microsoft Java Virtual Machine can be problematic. As a result, you should uninstall Microsoft Java Virtual Machine and install the latest Sun version in its place.
- 28.8 kps or faster modem if a broadband connection is not available. In general, dial-up connections are very slow and not recommended for testing.
- Internet connection. Using AOL as the Internet connection is NOT recommended for testing. AOL uses an "Idle Timer" that automatically logs the user off after a certain period of inactivity. While there are shareware programs that allow the user to circumvent this feature, they are prohibited by AOL's terms of service. Because testing requires using a secure browser, and not the AOL supplied browser, if the candidate is idle for long periods of time, they are likely to be disconnected during the exam.
- It is recommended that exams NOT be administered over a wireless network. Some locations have found it to be less reliable than a wired network. Technical and receptivity issues similar to those experienced with a cell phone often emerge and disrupt the exam process.
- Internet Explorer Version 5 or above. Internet Explorer does not need to be the default browser on the computer from which the exam will be administered, but it must be present on the computer. It is acceptable to have another browser, such as Netscape as the primary browser, as long as Internet Explorer Version 5 or above is present as well.

Attempting to run Questionmark Secure without Internet Explorer 5 or above will produce the following error message:

*“This application requires Internet Explorer version 5 or later to be installed.”*

If you do not have Internet Explorer, it can be downloaded from Microsoft's website or obtained from many other sources. This should be present on the machine even if it is not the default browser.

- ❑ All prior versions of the secure browser have been removed. Only Version 4.0 or higher should be installed.
- ❑ All anti-virus, anti-spam and pop-up blocker software has been turned off. You will most likely need to work with your IT department to determine if this has been done and/or how to do it. It is essential to disable any pop-up blockers; when there are five minutes left in an exam, a pop-up warning message appears to the candidate. This warning may not display if a pop-up blocker is installed on the testing computer. In addition, the software will NOT work if the default browser has ANY security set. This security MUST be turned off for the duration of the exam. Work with your IT staff as necessary. If the system administrator will not allow this to step to be completed, it is likely the browser will not function and the testing location is not a viable one.
- ❑ Turn off all other applications. If the test site is in a networked environment, the system administrator must turn off all applications, including client server applications such as WinVCS. Failing to do so will not allow the browser to function the following error messages may appear:
  - “An application is running in the background.”*
  - “Access denied.”*
  - “You must use an authorized server.”*

***This step must be completed every time the system is booted.*** Even if the browser was fully functional when testing the software in advance of the exam, all applications must be turned off again on the day of the exam because the computer resets every time the computer is booted. Typically, the system administrator is the person who has the rights to complete this task.
- ❑ The operating system is set to allow access to .dll files. Questionmark Secure is a .dll file.
- ❑ The date set on the computer matches the current date. Discrepancy in dates will stop functionality of Questionmark Secure.
- ❑ Firewalls settings have been reviewed. Firewalls occasionally cause a problem. If there is a firewall in place, you may have to consult your network administrator to clear the way for access. Ports 21, 25 and 80 must be available for the browser to work properly.

## 2.3 Installing Questionmark Secure

The Questionmark Secure browser should be installed only on the computer from which the exam will be administered. Prior to installing Questionmark Secure, make sure all prior versions of the browser (such as *Perception Secure Browser* have been removed.) After confirming all of the system requirements stated in the prior section have been met, follow these steps:

- Using an Internet Web browser, go to <http://www.questionmark.com/us/secure/>. A brief survey appears.

Please complete this survey before you download Questionmark Secure player:

E-mail address:

Type of organization: -- select --

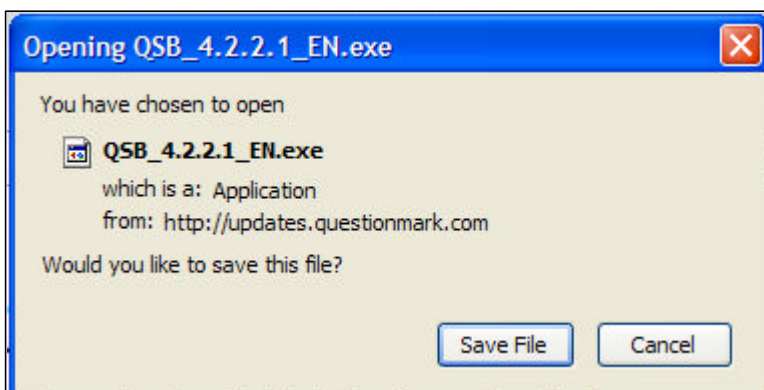
Country: -- select --

Language preference: -- select --

Completing this survey will allow you to join membership of Questionmark Communities, where you will have access to the latest Questionmark downloads, learning resources and our monthly email newsletter.

Please check this box if you do not wish to join Questionmark Communities.

- Complete the short survey. Make sure to check the box that says: **Please check this box if you do not wish to join Questionmark Communities.**
- Select **Get Questionmark Secure**.
- A window appears, telling you the name of file. Note: The name of your file may differ from what appears in this image. Newer versions of the software will have different version numbers in the file name.

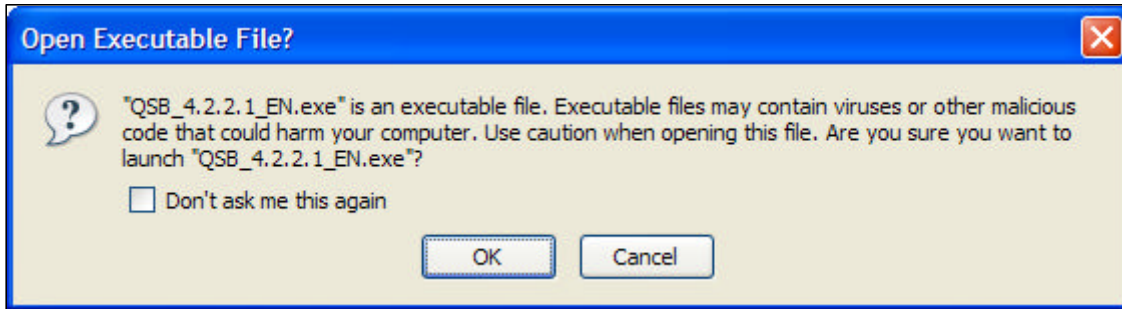


Depending on your operating system, the file may be automatically downloaded to your desktop. If it is not automatically downloaded, select the option to **Save File** and save the file to your desktop; this will make it easy to locate once the download is complete. Keep the default file name.

- When the download is complete, locate the file on your desktop and double-click on it to start the installation process. The file icon will resemble the icon at the right.



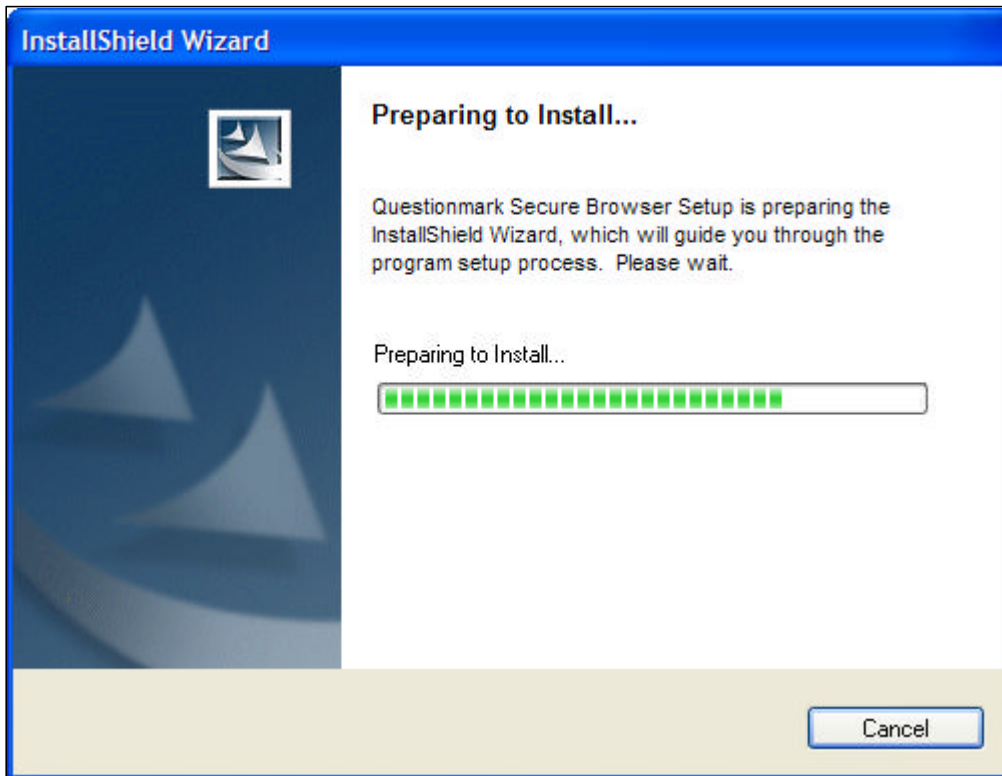
6. You may receive a warning message similar to the following:



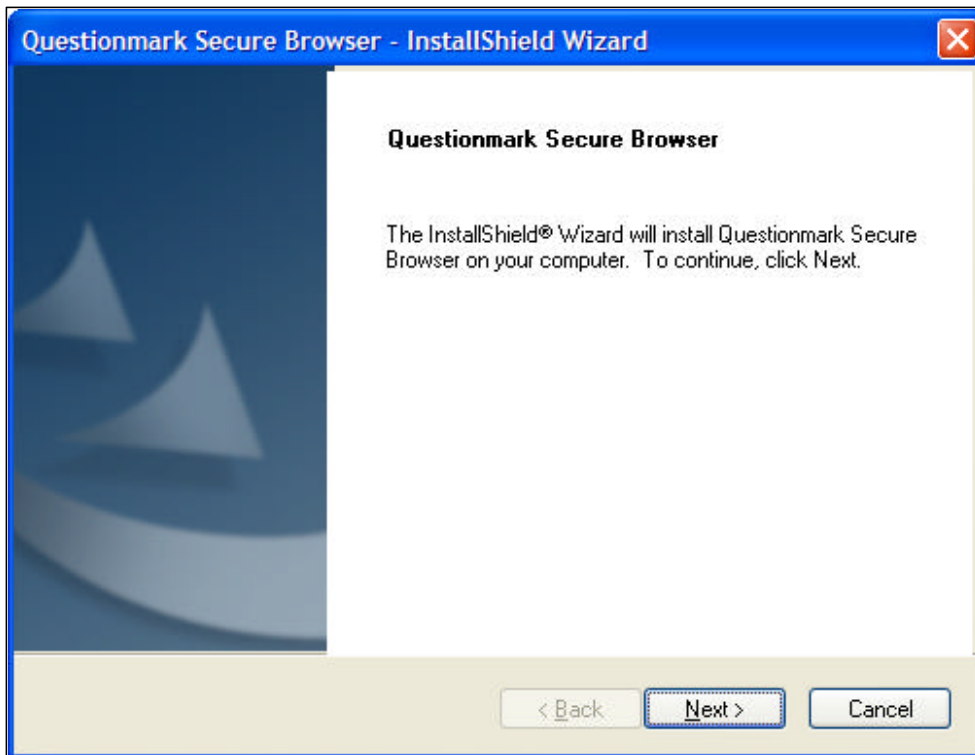
If you receive this message, click **OK**.

Note: If you are using Vista, the User Account Control Window may appear. If so, select **Continue**.

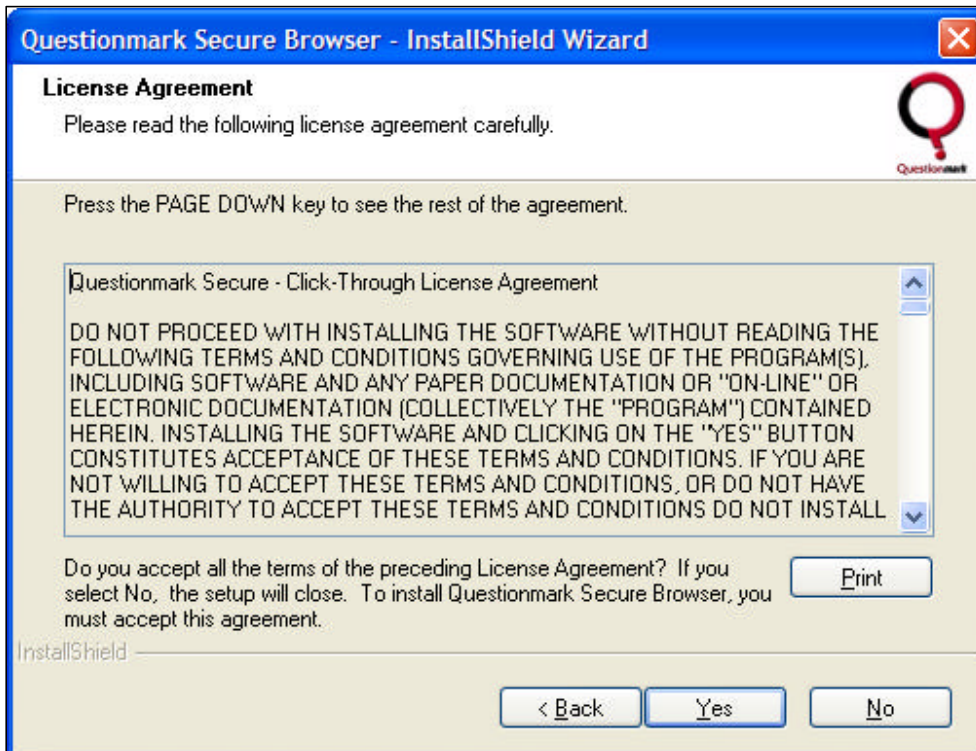
7. The **InstallShield Wizard** appears. The **Preparing to Install...** screen appears.



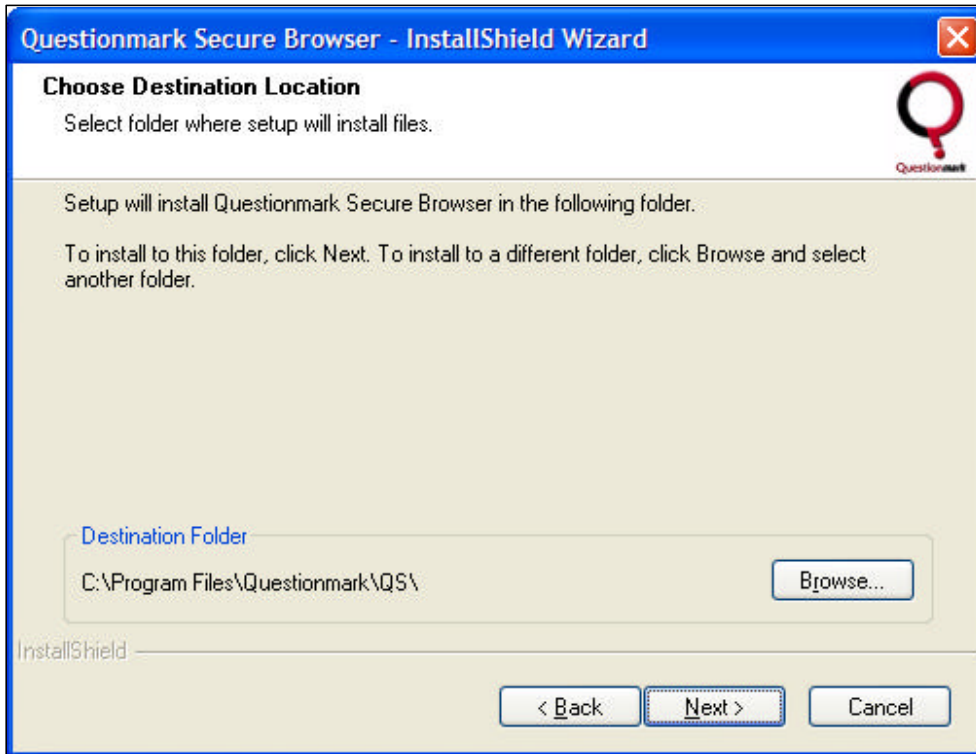
8. When the preparations are complete, the Wizard indicates that it is ready to install.



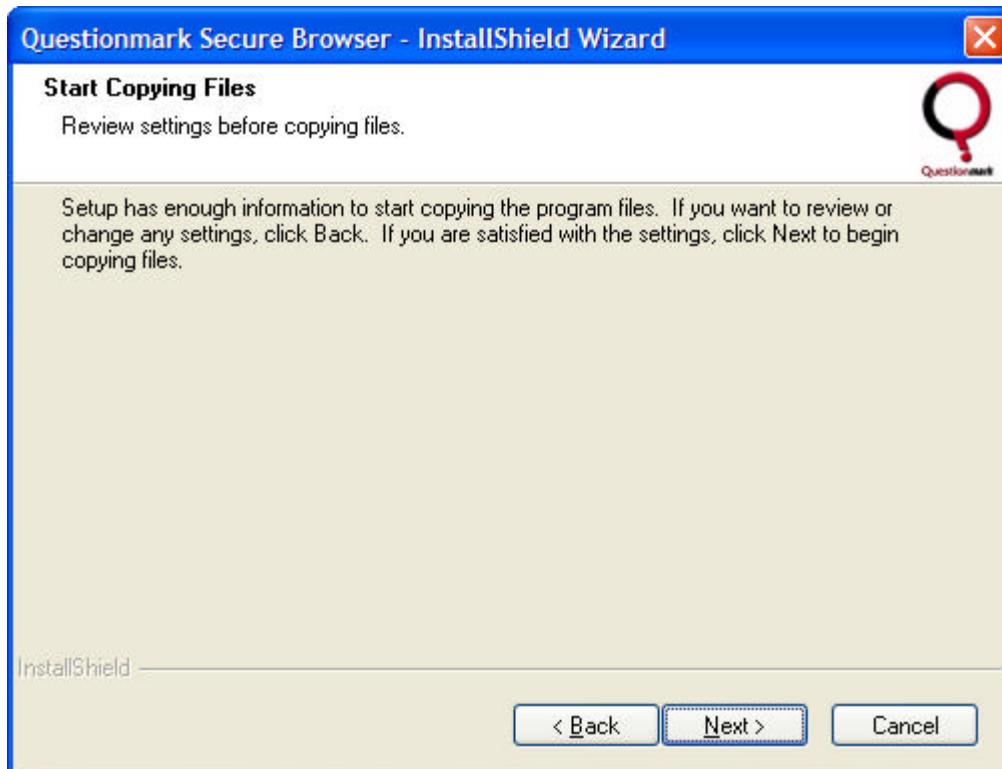
9. Select **Next**.  
10. The **License Agreement** screen appears.



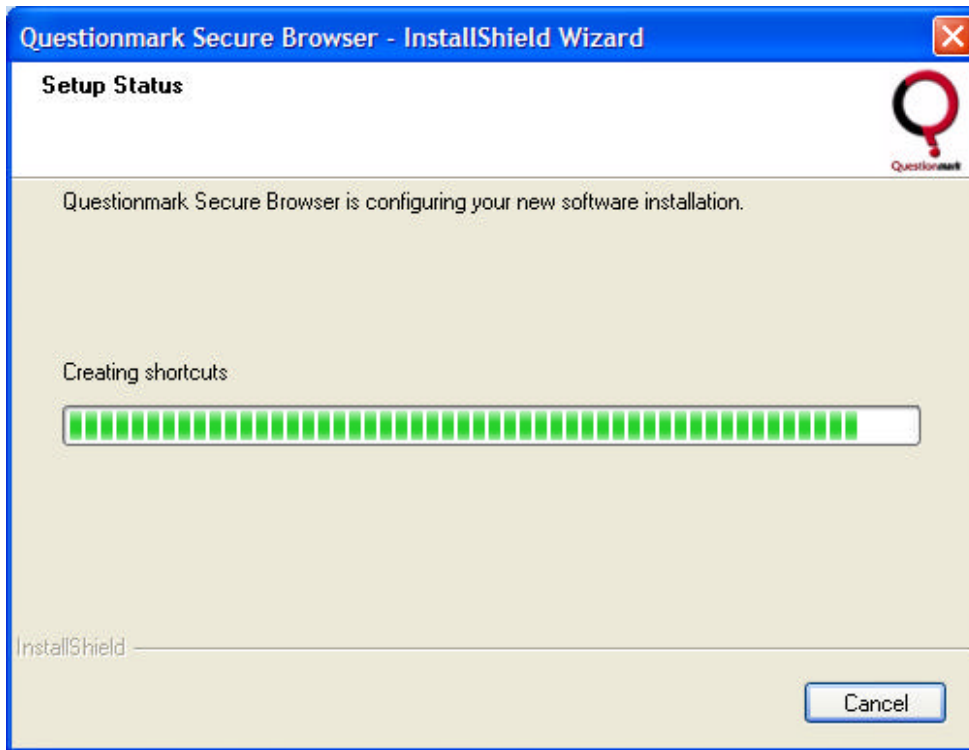
11. Review the terms of the agreement and select **Yes**. The **Choose Destination Location** window appears. If you do not want to use the default installation location, select **Browse** to select a different location.



12. Select **Next** to accept the default installation location. The **Start Copying Files** screen appears.

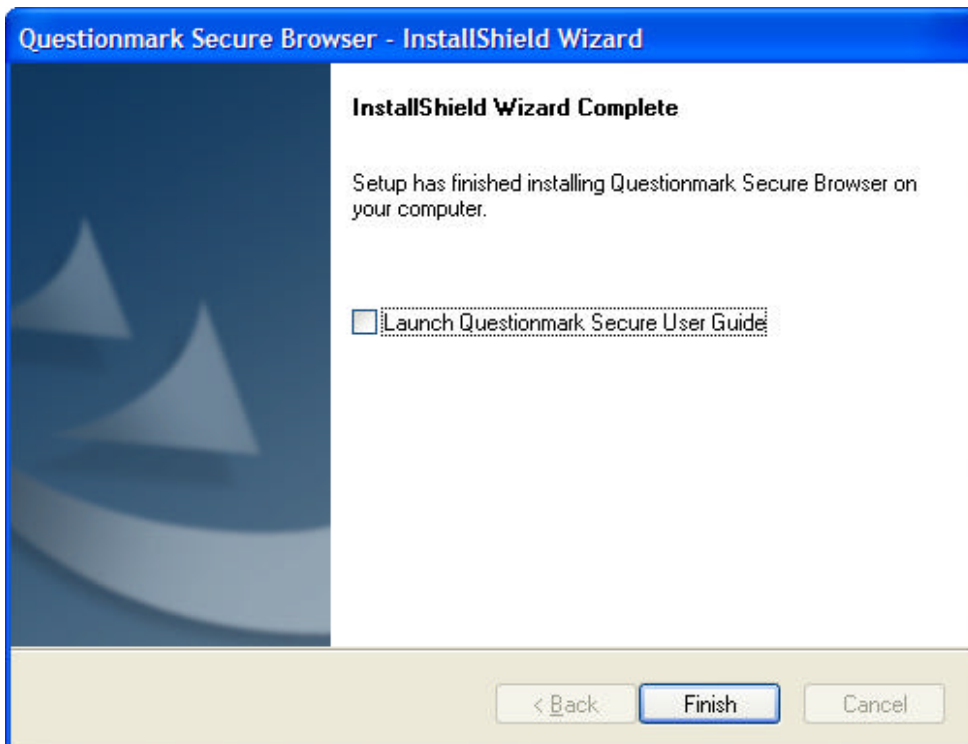


13. Select **Next**. The **Setup Status** screen appears.



14. When the installation is complete, the **InstallShield Wizard Complete** screen appears.

If you want to launch the Questionmark Secure User Guide after completing the installation, check the box to open it. Click **Finish**. Questionmark Secure is now installed. *Be sure to test for full functionality of the browser (as described in the next section). Check it again on the exam day.*



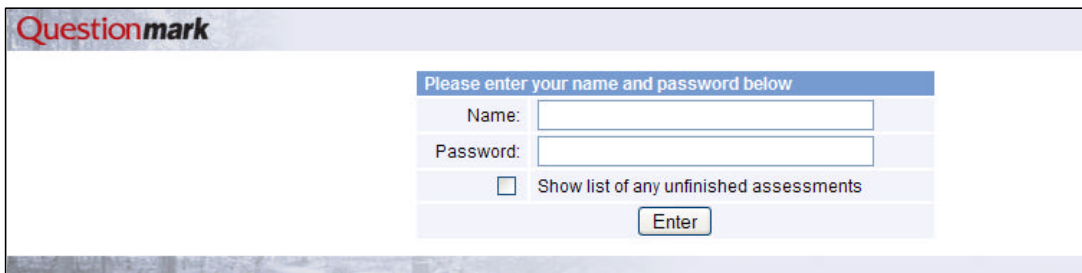
## 2.4 Testing the System Functionality (Prior to and on the Exam Day)

A sample test is available at all times to test your secure browser connection and the test server. Test the system far enough in advance to allow adequate time to troubleshoot any issues that may arise. *This procedure should be tested again the day of the exam, prior to a candidate attempting to access the assigned exam.* To complete the connection test, complete the following steps:

1. Launch an Internet Web browser and enter this address:

<http://hosting.questionmark.com/hfma/perception.dll>

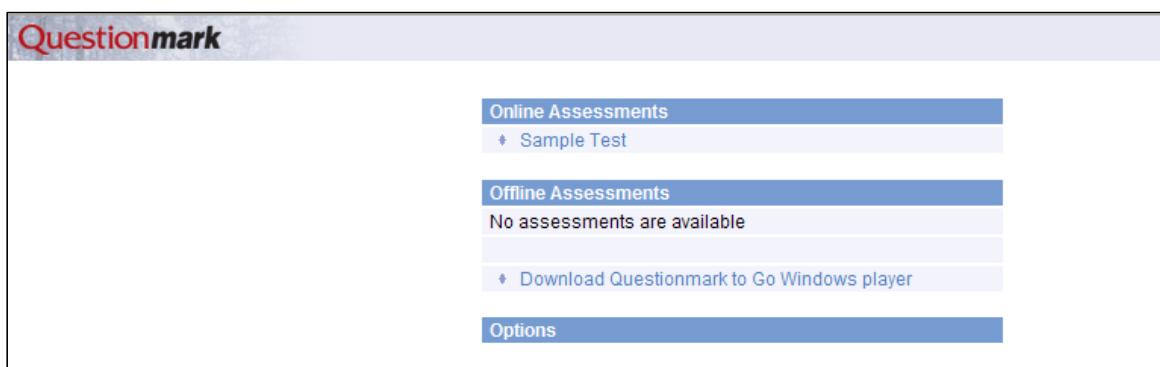
A login screen appears.



2. In the **Name** field, enter “hfmatest” (all lower case).

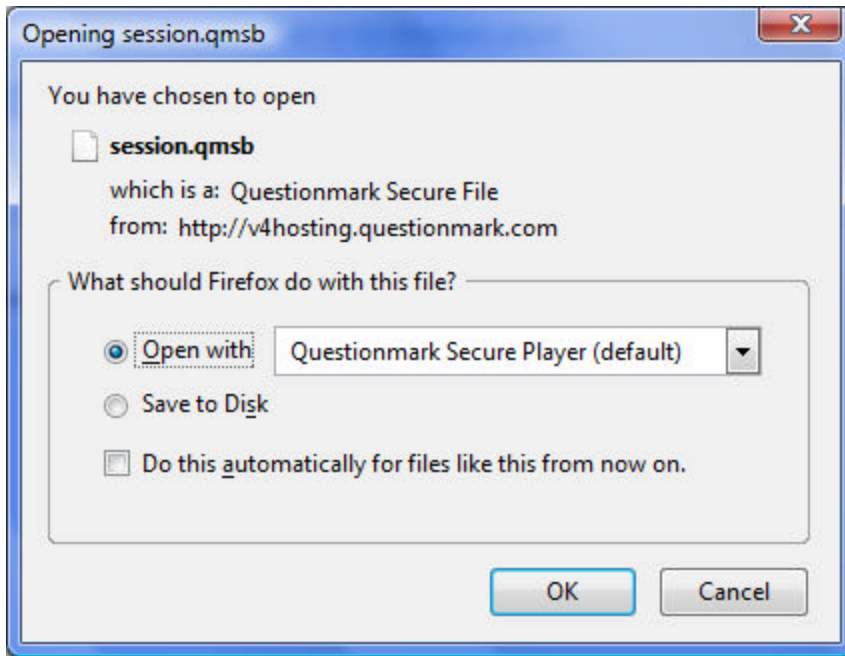
Note: Do NOT use “hfmatest” as your password on exam day. You are provided a different password for proctoring the actual exam. For every candidate you proctor, HFMA National assigns a unique and date-sensitive password.

3. In the **Password** field, enter “hfmaproctor” (all lower case). Passwords are case-sensitive and must be typed in lower case. This password will only provide access to the sample test; it will **not** provide access to the actual exams.
4. Select **Enter**. A list of Online and Offline Assessments appears.



5. Click the link for **Sample Test**.

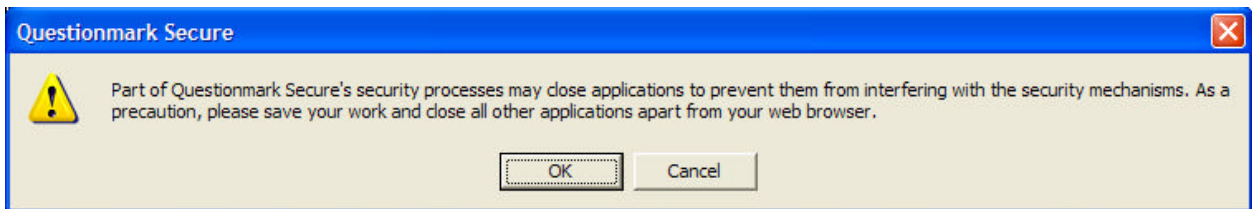
6. Depending on the browser you are using, you may receive a warning message as follows:



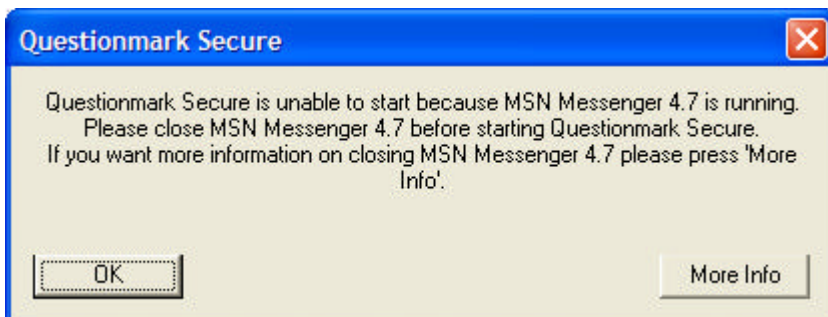
If this message appears, make sure the **Open with** field says *Questionmark Secure Player* and select **OK**.

Note: If you are using Vista, the User Account Control Window may appear. If so, select **Continue**.

7. A warning appears, reminding you to close all open applications.

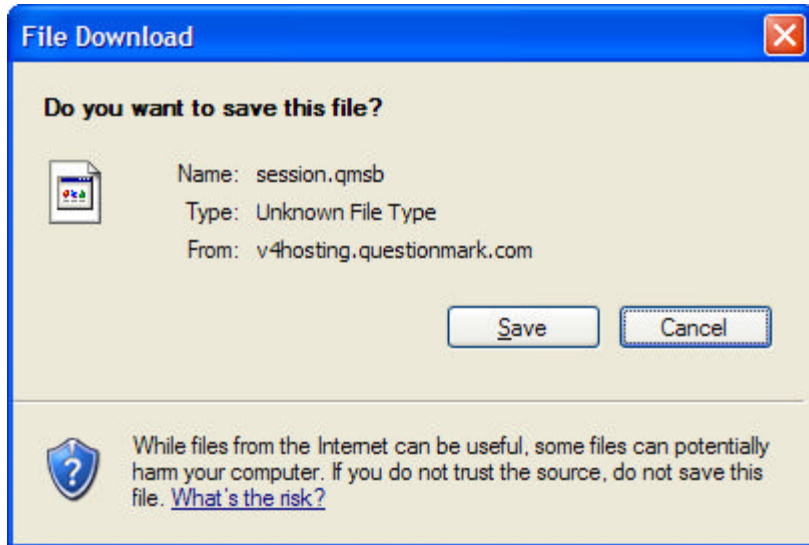


8. Click **OK**.
9. If you have any programs open, such as MSN Messenger, you may receive a message similar to the following:



Close any open programs before trying to access the Sample Test again. Click **More Info** for specific instructions relating to the open program.

If you attempt to access an assessment and you have not installed Questionmark Secure, you will receive the following message:



If you receive this message, click **Cancel** and follow the directions in the “Installing Questionmark Secure” section.

10. If you are able to access the sample test and see the sample question, the connection has been established.
11. To ensure that the “Save As You Go” feature will work properly, leave the sample test open for three minutes. If no error messages appear, the browser is functioning properly. If you receive any Java script errors, check to make sure Microsoft Java Virtual Machine is not running. (See the “System Requirements Checklist” for more information.)
12. Please exit at this time. It is NOT necessary to answer the question or to submit the test.

**Note:** If you are unable to access the sample test, the installation was NOT successful or not all of the installation requirements have been met. Seek guidance from your network administrator for requisite installation procedures and system requirements.

## ***2.5 Exiting/Shutting Down the Browser***

To exit an exam and close Questionmark Secure, use either of the following methods:

- Click the exit button in the upper left corner of the screen.
- Hit **Alt+f4** on the keyboard.

Exiting or hitting **Alt+f4** while a testing session is in progress will end the session and report an abnormal ending for that session.

### 3. PROCTOR RESPONSIBILITIES ON EXAM DAY

1. Confirm the functionality of the browser prior to the candidate arriving to complete the exam. Seek IT support from the facility as needed. It is possible that firewall or other settings may have changes since the browser was first installed.
2. Verify the identity of the candidate by checking a driver's license or other form of picture identification to ensure the proper candidate is taking the exam. A candidate attempting to have someone else complete the exam is a violation of the HFMA Code of Ethics and the candidate and/or the attempted substituted exam taker will be subjected to consequences for the action based on a review of the situation. Report any violation immediately to HFMA.
3. Sign on as proctor to Questionmark Secure to allow the candidate access to the exam(s). The candidate is allowed only one attempt at each assigned exam on a given exam date. Enter your password in the "Password" field.
4. Assist the candidate in logging on to the exam. Ensure proper connection.
5. Ensure the candidate has access to the proper exam (s) for which they paid for on the exam application (Core, Accounting and Finance, Patient Financial Services, Financial Management of Physician Practices, or Managed Care). *If an incorrect exam is listed, contact HFMA National immediately.* Do not allow the candidate to start the incorrect exam or to allow another candidate to start that exam with the other person's log on.
6. Make sure that the candidate understands how to enter responses to the exam questions.

#### 3.1 Maintain Test Security during the Exam

HFMA (the Professional Development department, the Board of Examiners, and/or the HFMA Board of Directors) reserves the right to audit test sites and ensure adherence to exam procedures. Any noted or suspected irregularities or compromise of the exam or testing process may result in the proctor no longer being eligible to proctor exams, being prohibited from taking any certification exam, and/or having their certified status and/or HFMA membership revoked, among other potential consequences. Candidates who are reported to be or are suspected of compromising the exam or testing process may be prohibited from taking any exam, applying for certification, and/or retaining HFMA membership and/or certified status, among other potential consequences.

Your responsibility as a proctor is to protect the integrity of the exams and testing process and requires that you monitor the activities of anyone taking the exams by adhering to the following:

1. You cannot explain or provide information regarding the interpretation of question content that the candidate may find unclear.
2. Copying of questions in part or whole by the candidate, proctor or anyone else is fully restricted. Report immediately to HFMA any attempt to copy the questions. Like the self-study course materials, ***the exams are copyright protected. The exams may not be duplicated in part or whole for any reason.*** Doing so would be a breach of confidentiality and the situation subjected to review by the Board of Examiners for determination of the appropriate consequences. The ruling of the BoE is considered final.

3. Only the HFMA-approved proctor designated on the exam candidate's application and to whom the password was e-mailed should be administering and proctoring that scheduled exam. Change of proctors must be submitted in writing (email to [certification@hfma.org](mailto:certification@hfma.org)) at least two (2) business days prior to the scheduled exam date and the requested substitution approved prior to the substitution being allowed. If it is determined that an unauthorized substitution was made and/or an unapproved person is proctoring the exam, this would be considered a breach of policy that would be reviewed by HFMA and potentially result in consequences against the designated and/or the substitute proctor. Only the approved person proctoring the exam will be eligible to receive a Founders Point toward the certification maintenance requirement, with a maximum of one point being awarded per award year.
4. Remain in the room during the entire time of the exam and ensure that the exam or testing process is not compromised. Leaving the room compromises the testing process, is considered a breach of policy, and may result in HFMA revoking the candidate's test score for that exam during which the proctor's absence occurred, among other potential consequences.
5. Cell phones or other image capturing devices are not allowed in the testing room/area as it can be disruptive and potentially compromise the integrity of the exam/testing process. Candidates are *not* allowed to have access to a phone during the exam or any breaks from the exam to avoid the possibility of dictating questions to another person. A candidate receiving or making a phone call during the exam compromises the exam and/or testing process and may result in HFMA revoking the candidate's test score for that exam during which the phone call occurred, among other potential consequences. To avoid disruption to the exam candidate, proctors should not make or receive phone calls during an exam. Candidates are not allowed to use cell phones as a calculator.
6. The candidate is not allowed to bring the study guide or any other materials into the testing room/area and these materials should not be readily available to the candidate, including during any break times. Attempts to use reference materials can be a basis for termination of the examination and the candidate being prohibited from taking any exam in the future.
7. The candidate is not allowed to have scratch paper. The proctor may supply scratch paper. Any used scratch paper must be collected by the proctor from the candidate and destroyed.
8. Candidates are not allowed to spend time on activities not related to completing the exam. The testing program is set up to prevent candidates from saving files to disk, printing the questions, or anything else that would compromise the exams.
9. Candidates should not spend excessive lengths of time away from the testing station. Restroom breaks are allowed, but they should be reasonable in length. Excessive breaks open the possibility of the candidate researching the answer to questions, collaborating with someone about the content of the exam, and possibly receiving outside assistance. Candidates are not allowed to make phone calls during breaks. Candidates should be reminded that the exams are timed and the clock does not stop running if they walk away from the on-line exam. Candidates taking excessive or extended breaks are considered to be potentially compromising the testing process and such incidents may result in HFMA revoking the candidate's test score for that exam during which the incident occurred, among other potential consequences.

If you find a candidate compromising the exam/process, you should end the exam immediately and report the candidate to HFMA National (Joe Abel, Director of Professional Development at 1-800-252-4362, X335 or [jabel@hfma.org](mailto:jabel@hfma.org)) for potential violation of the HFMA Code of Ethics. The candidate may be prohibited from taking any exam, applying for certification, and/or retaining HFMA membership and/or certified status, among other potential consequences. HFMA National, the HFMA Board of Examiners and/or the HFMA National Board of Directors may review the situation.

### **3.2 Prior to Accessing the Exams**

1. Re-confirm the functionality of the browser prior to the candidate arriving. Test the system again as described in the “*Testing the System Functionality (Prior to the Exam Day)*” section of this handbook. Seek assistance from your system/network administrator as needed. It is possible that firewall or other settings may have changed since the browser was first installed.

**NOTE:** The Questionmark Secure browser will open automatically each time you attempt to access the sample exam or an actual an exam. Each time the browser is opened, it checks to see if a new version is available. If a new version of Questionmark Secure is available, you will be prompted to download it. If you receive this prompt, download the new version.

2. Read the “Accessing and Completing an Exam” section in full. Become familiar with the testing format and familiarize the candidate with what to expect, including how to answer questions and how to submit the answers at the end of the exam.
3. Verify the identity of the candidate by checking a driver’s license or other form of picture identification to ensure the proper candidate is taking the exam. A candidate attempting to have someone else complete the exam is a violation of the HFMA Code of Ethics and the candidate and/or the attempted substituted exam-taker will be subjected to consequences for the action, based on a review of the situation. Report any violation immediately to HFMA.

### 3.3 Accessing an Exam

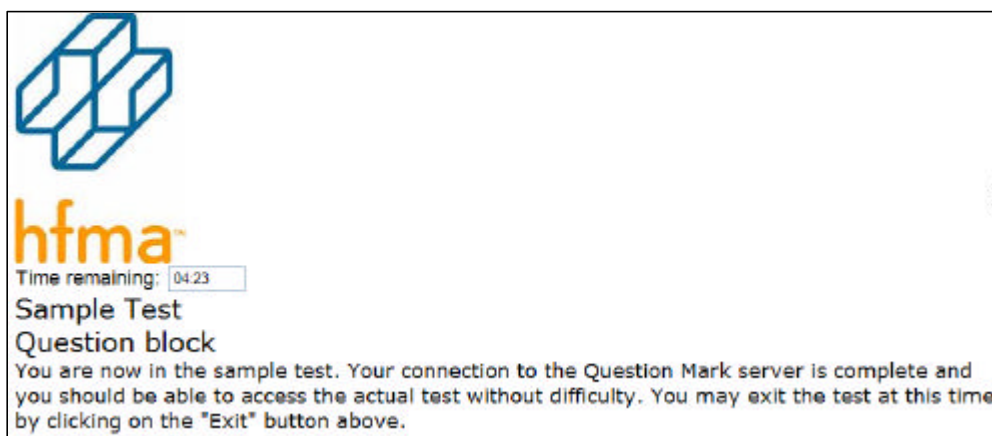
1. On exam day, open an Internet Web browser and go to:  
<http://hosting.questionmark.com/hfma/perception.dll>. A login screen appears.
2. Assist the candidate in logging on to the exam. The candidate is allowed only one attempt at each assigned exam on a given exam date:
  - a. In the **Name** field, the candidate should enter their Candidate's Password, exactly as provided to the candidate in the e-mail notification from HFMA National.
  - b. In the **Password** field, you should enter the Proctor's Password, exactly as provided to you in the e-mail notification from HFMA National. If you are proctoring multiple candidates, be sure to enter the appropriate password for each candidate.

Some important notes related to passwords:

- If you are testing your connection and you connect to this site, you are in the right place. You cannot go further without the candidate's password and will not have access to the actual exam until the scheduled date for that exam.
  - Both the Candidate and Proctor's *passwords are case sensitive*. If they are typed in upper case on your notification letter, they must be entered in upper case. Enter these passwords exactly as provided to you and the candidate in the e-mail notification sent from HFMA National. If the passwords are not functional, contact HFMA immediately. *Never use someone else's password.*
  - Be careful of the letter "l" and the number "1" (one), as well as the letter "O" and the number "0" (zero). HFMA will make every effort to be clear in our communications, but help us by bringing your materials with you to the testing site.
  - Select **Enter**. A list of the exams that have been assigned to and are available to the candidate (the exams that he or she has advance registered for) appears.
3. Ensure the candidate has access to the proper exam (s) for which they paid (Core, Accounting and Finance, Patient Financial Services, Financial Management of Physician Practices, or Managed Care). If an incorrect exam is listed, contact HFMA National immediately. Do not allow the candidate to start the incorrect exam or to allow another candidate to start that exam with the other person's log on.
  4. Review the *Exam Instructions for the Candidate* on the following pages with the Candidate.

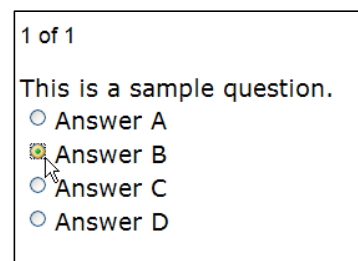
### 3.4 Exam Instructions for the Candidate


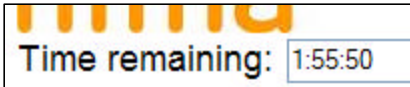
- You may select any of the exams on the list.
- There is no required sequence for taking the exams.
- To choose an exam to launch, click on the name of the exam.
- Each exam is set up to upload only ONE TIME, i.e., when you click the name of the exam. **It may take a few moments for the exam to load. Do not click the exam link more than once.** Pushing the button again will halt the original download of the exam and try to download the exam again. This will lock you out of the system and require a call to HFMA national to resolve.
- The first screen of the exam is an introduction. (A sample of the introduction screen appears in Appendix B.) After reading the introduction, press **Submit**. The second screen is a Confidentiality Agreement. You must read and agree to the affidavit by pressing **Submit**.
- The timer for the exam starts after the Confidentiality Agreement is submitted. Once this is done, the first section of the selected exam will be downloaded. A page will appear with the HFMA logo and a time clock in the upper left hand corner, similar to the image below.



When you begin the first section of the exam, the time clock will reflect the full time allowed for the exam, i.e., two hours for specialty exams or four hours for the Core exam.

- Questions are presented in sections. At the beginning of each section, the screen will display the name of the topic being tested and the number of questions that have been completed.
- Answer questions by using the mouse to click on one of four circles in front of the four answer options. (Similar to the image at the right.)
  - If an option is selected, the center of the circle will be filled by a dot. It is necessary to click on the circle to select an answer; clicking on the text will not make the selection.
  - It is not possible to click on more than one option for any question. There is only one correct answer to each question.
  - If another option is selected, that circle will be filled by the black dot.



- Unanswered questions are scored as incorrect. The final score is based on the total number of questions answered correctly on the exam.
- At the bottom of each section there are two selection buttons: **Submit** and **Reset**
  - Press **Submit** to go the next exam section. You will *not* be able to return to previous sections once you press **Submit**. The answers selected in each section will be uploaded and they cannot be changed after the submit button is clicked. 
  - You may review the questions in an exam section and change answers but only until you hit the **Submit** button.
  - **Do not to hit Submit more than once.** There may be a delay as the system processes the request. Hitting the **Submit** multiple times button will not speed the process and may result in the system shutting down. If the system shuts down, notify the proctor and attempt to log back in. If access to the exam is denied, assistance will be required from HFMA National to gain access back into the exam.
  - If you select **Reset**, all answers in that section will be erased, and you will have to re-answer all questions. Unless you want to completely “start from scratch” on the section, using **Reset** is not recommended.
- The clock at the top of each section tracks the time you have remaining. Continue to work through sections, and submit them as you complete them. If there is an Internet disconnect, the system will allow you back in at the point when the disconnect occurred. Please be advised that the clock does not stop running during this time. 
- You should receive a warning when there are five minutes remaining. If the allotted time runs out before you complete the exam, the system will shut down the exam, whether you press submit or not. At that time, the system will save any answers that have been submitted, and the exam will be ended. Sections not submitted will not be scored. The final score is based on the total number of questions answered correctly. This will be considered your final total score for the attempted exam.
- After you submit the last section, your score will appear on the screen. One of two following messages will appear on the screen.
  - You have earned a score of (1 - 20) and 21 is the minimum passing score. You have not been successful on this exam.
  - You have earned a score of (21 - 28) and 21 is the minimum passing score. Congratulations, you have passed this exam.
- You may print this screen. You will also receive your score via e-mail. The score will be sent to the e-mail address included in your HFMA member profile. It is your responsibility to ensure accuracy of this information. Scores (including Pass or Fail status) are not shared by HFMA with anyone other than the candidate. You are not required to share your score with the proctor. Proctors are not allowed to share your exam score or status (i.e., pass or fail) unless explicit permission is received from the candidate. If you encounter any computer errors during the exam, please let the proctor know.

### **3.5 Potential Errors/Technical Issues During an Exam**

#### **Error Messages**

If the candidate receives a script error similar to the one below, advise them to select **No**. This should enable them to return to the exam at the point they left off.

*“A script error has occurred on this page. Do you want to continue running scripts on this page?”*

Be advised that the clock continues to run during this process.

#### **System Shut-Downs**

Power outages, loss of internet connections and other technical problems may occasionally result in a candidate getting “kicked out” of an exam. If this occurs:

1. If necessary, restart/reboot the computer.
2. Open an Internet Web browser and return to:  
<http://hosting.questionmark.com/hfma/perception.dll>. A login screen appears.
3. In the **Name** field, the candidate should re-enter their Candidate’s Password, exactly as provided to the candidate in the e-mail notification from HFMA National.
4. In the **Password** field, you should re-enter the Proctor’s Password, exactly as provided to you in the e-mail notification from HFMA National. If you are proctoring multiple candidates, be sure to enter the appropriate password for each candidate.
5. Check the box next to “Show list of any unfinished assessments.”
6. Select **Enter**. The unfinished exam should appear. If no exam appears, log in a second time to confirm you have entered the correct passwords. If no exam appears after the second attempt, contact HFMA National for further instruction.
7. If the exam link appears, the candidate should click the link to resume the exam.

Note: The candidate should be returned to the last unsubmitted section of the exam. The exam saves responses in 10-minute intervals, so it is possible that the candidate may have lost some unsubmitted responses. If this happens, instruct them to re-enter the missing responses.

### **3.6 After the Candidate Completes the Exam**

1. Candidates receive their scores on the screen almost immediately after they submit the last section of a given exam. In an effort to honor the privacy of the candidate, it is suggested that you afford some privacy to the candidate as they submit their last exam section and as the exam score is presented. The secure browser allows the candidate to print this screen.
2. It is HFMA’s policy not to disclose an individual’s score or status on an exam (i.e., pass or fail) to anyone other than the candidate. HFMA National releases to HFMA chapters only the total number of passed exams per month, without ever releasing the names of the individual candidates. Candidates are not required to share their score with the proctor. Proctors are not allowed to share a candidate’s exam score or status (i.e., pass or fail) unless explicit permission is received from the candidate. A candidate’s exam score is considered confidential information.

3. Candidates will also receive their scores via e-mail transmitted through the testing system. The score will be sent to the e-mail address included in the candidate's member record. It is the responsibility of the candidate to ensure accuracy of that information.
  - Candidates who do not successfully complete the exam are required to wait a minimum of 90 days before retaking the exam. There is no exception to this policy of timeframe for retaking the exam. Candidates have 24 months to successfully complete the Core and a specialty exam from the date the first exam is successfully completed. There is no exception this policy of timeframe for successfully completing the exams as an eligibility requirement for becoming a Certified Healthcare Financial Professional (CHFP).
  - Candidates who retake the exam must submit a new application with the appropriate fee and abide by all of the procedures required for applying for an exam. They will need to arrange for and then indicate on the application when they will retake the exam and the name of the proctor. (Phone applications are not accepted.)
4. Specific questions about a candidate's score or any questions about certification in general, next steps, other requirements for certification, etc. to HFMA National staff as appropriate, should be referred to HFMA staff. Candidates can also access information about the HFMA certification program on the HFMA website (hfma.org) under the certification area.

### **3.7 Removing Questionmark Secure**

If the computer from which you administered an exam will NOT be used to administer other exams in the near future, please remove Questionmark Secure using the following steps:

1. Go to the **Start** menu and open the **Control Panel**.
2. Select **Add/Remove Programs** (Windows XP and earlier) or **Programs/Uninstall a program** (Vista).
3. Highlight **Questionmark Secure Browser**.
4. Click the **Remove** or **Change/Remove** button (Windows XP and earlier) or **Uninstall/Change** button (Vista).

Note: If you are using Vista, the User Account Control Window may appear. If so, select **Continue**.

5. The Install Shield window will appear briefly.
6. On the confirmation screen, select **Yes** or **OK** to confirm removal. The Install Shield window will appear briefly again.
7. When the **Uninstall Complete** screen appears, click **Finish**.
8. Close the Add or Remove Programs and Control Panel windows.

## Appendix A: Sample e-mail password notification sent to proctors

**If you have not downloaded Perception Questionmark Secure browser version 4 or higher, please see the Proctor Handbook for instructions.**

**Ensure all prior versions of the software have been removed and all installation procedures have been followed closely.**

**It is the responsibility of the proctor to ensure the browser is fully functional on the day of the scheduled exam.**

Thank you for serving as a HFMA Certification Examination Proctor. By signing the Proctor Affidavit and agreeing to serve as a proctor, you agree to abide by all of the policies and procedures stated in the Proctor Handbook provided to you earlier.

This notice summarizes only some of the policies and procedures related to proctoring an HFMA certification exam. For detailed information on how to load and test functionality of the browser as well as exam administration procedures, please refer to Proctor Handbook. As a proctor, you are fully responsible for adhering to the stated policies and procedures.

**Scheduled Exam(s).** Currently, you are scheduled to proctor the following candidate(s) for the following exam(s) on \_\_\_\_\_.

- \_\_\_\_\_ taking the \_\_\_\_\_ exam.

**Passwords:** Your password is \_\_\_\_\_

- This password is case sensitive and it must be entered exactly as provided above. It is also time sensitive and valid only for the above scheduled exam date between 12:00 a.m. and 11:59 p.m.
- When logging on to the exam, enter this password in the “Password” field of the log on screen. Be sure to accurately enter the letters “I” and “O,” and the numbers “1” and “0”.

**Install software prior to the exam date.** Install and test the Secure browser with enough lead time to ensure it is fully functional *prior* to the exam date. Improper installation of the browser may result in disruption to the testing system. Work with your IT staff, as necessary, to install the secure browser as specified in the Proctor Handbook. The browser should be fully tested prior to the administration of exam for *each exam date*.

**Candidates photo identification.** On the exam day, the candidate is require to present to you a photo identification card such as a state-issued driver’s license, so you can verify the candidate as the approved exam taker.

**Allowable calculators.** During the exam, candidates are allowed to bring a silent, battery operated, non-printing calculator. You are not expected to supply calculators.

**Materials NOT allowed at the exam site.** Candidates are not allowed to bring to the testing site any study aid materials, scratch paper, food or beverage, cell phone, or any type of recording

device. Any scrap paper you provide to the candidate must be collected at the end of the exam and prior to the candidate leaving the exam site. You are then required to destroy this paper.

**Proctor assistance during the exam.** You are not allowed to provide assistance to the candidate that could potentially affect how they answer a question and/or their overall score. Your role is to ensure integrity of the testing process and exam. *You are required to remain at the testing location for the entire duration of the exam.* The candidate is not obligated to reveal to you how they scored on the exam.

**HFMA assistance** is available only during normal business hours (8:00 am to 5:00 pm CST) Monday through Friday.

**Candidate's completion of the exam.**

- The candidate is presented with multiple-choice format questions one section/chapter at a time. As they complete that section, they “submit” it. Once a section is submitted, they will no longer have access to it and cannot go back into it. Unanswered questions are scored as incorrect.
- When submitting a section, a candidate should hit the “submit” key only once. Hitting it twice may cause a disruption to the system and “bump” the candidate out of the exam. Be patient and allow time for the section to be electronically submitted and processed.
- Candidates are allowed up to four hours to complete the 166-item Core exam and up to two hours to complete each 83-item specialty exam. Once they begin the exam, the clock continues to run. If a candidate does not complete the exam within the time limit, the exam terminates and their score will be based on the total number of items answered correctly. This does not mean the system malfunctioned.
- After all sections are completed, the candidate receives their score. A scaled score of 21 is passing. This screen can be printed. The candidate is not obligated to share this score with you or anyone else.

If the candidate unsuccessfully completes an exam, they will be allowed to retake it in 90 days. There are no exceptions to the time frame. For exam re-takes, the candidate is required to submit a new exam application with the appropriate fee at least 10 business days prior to the exam date.

**CHFP Application.** If the candidate successfully completes both the Core exam and one specialty exam, they have met the exam requirement for becoming certified. Passing both exams does NOT mean the candidate is automatically certified. The candidate is required to submit a conforming CHFP application. Processing of application and issuance of certificates takes 60 to 90 days. Certificates are mailed to the Chapter President for distribution in a manner of their choice.

**Questions?**

Additional information about the certification process can be found in the Certification area of the HFMA web site ([hfma.org](http://hfma.org)). For further assistance, please contact a member of the HFMA certification team at 1-800-252-4362 or [certification@hfma.org](mailto:certification@hfma.org)

## **Appendix B: Exam Introduction Information Provided to the Candidate**

The following information appears at the beginning of every exam to inform and guide the candidate through the examination process:

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You are about to begin the HFMA certification examination. If this is not the exam for which you have registered, notify your proctor immediately and do not proceed any further.

The multiple-choice questions on this exam are based on content covered in the self-study course material. The specialty exams each have 83 questions and the Core exam has 166 questions. The exam questions are grouped into sections representing chapters in the self-study course.

There is only one correct answer for each question and there is no penalty for guessing. Select the best response by clicking on the circle next to your selected answer. The circle will be highlighted. Unanswered questions are scored as incorrect.

After you complete the questions in each section, you are requested to “submit” your answers. Until you “submit” your answers to a section, you may continue to answer questions and change answers within that section. Once you “submit” an exam section, you may not return to that section and will no longer be able to change any of your responses.

You are allowed two (2) hours to complete the specialty exam and four (4) hours to complete the Core exam. If you have not submitted your last exam section by that time, the computer will terminate your exam and your score will be based on the number of questions you have answered correctly. The clock will not start running until you have accessed the first question on the exam and will stop after you have submitted the last section of the exam or after the maximum allowed time has been reached, whichever comes first.

### **Candidate Confidentiality Agreement**

*All candidates for Certification are required to agree to the following statements:*

I hereby apply to the Healthcare Financial Management Association (“HFMA”) for examination and issuance to me of Certification as Certified Healthcare Financial Professional (CHFP), in accordance with and subject to the procedures and regulations of HFMA. I have read and agree to the conditions set forth in the HFMA Certification Exam Candidate Handbook covering the administration of the Certification Examinations; the Certification process; and HFMA’s policies. I agree to disqualification from examination; to denial of Certification, and to forfeiture and redelivery of any certificate granted me by HFMA in the event that any of the statements or answers made by me in this application are false or in the event that I violate any of the rules or regulations governing such examination.

I authorize HFMA to make whatever inquiries and investigations it deems necessary to verify my credentials and professional standing. I understand that this application and any information

or material received or generated by HFMA in connection with my Certification will be kept confidential and will not be released unless I have authorized such release or such release is required by law. However, the fact that I am or am not, or have or have not been Certified is a matter of public record and may be disclosed, and I authorize HFMA to make such disclosure to the HFMA Chapter of which I am a member. Finally, I authorize HFMA to use information from my application and subsequent examination for the purpose of statistical analysis, provided my personal identification with that information has been deleted.

I understand that the content of the Certification Examinations is proprietary and strictly confidential information. I hereby agree that I will not disclose, either directly or indirectly, any question or any part of any question from an Examination to any person or entity. I understand that I can be disqualified from taking or continuing to sit for an Examination, or from receiving Examination scores, if HFMA determines through either proctor observation, statistical analysis, or any other means that I was engaged in collaborative, disruptive, or other unacceptable behavior during the administration of or following the Examination.

I further understand that the unauthorized receipt, retention, possession, copying or disclosure of any Examination materials, including but not limited to the content of any Examination question, before, during, or after the Examination may subject me to legal action. Such legal action may result in monetary damages and/or disciplinary action including denial or revocation of certification or re-certification.

I hereby agree to hold HFMA, its officers, directors, examiners, employees, and agents, harmless from any complaint, claim, or damage arising out of any action or omission by any of them in connection with this application; the application process, any examination given by HFMA; any grade relating thereto; the failure to issue me any certificate; or any demand for forfeiture or redelivery of such certificate. I understand that the decision as to whether I qualify for certification rests solely and exclusively with HFMA and that the decision of HFMA is final.

***I HAVE READ AND UNDERSTAND THESE STATEMENTS AND I INTEND TO BE LEGALLY BOUND BY THEM.***

***Press “Submit” to access the first section of the exam.***

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