Certification in Otolaryngology Practice Management (COPM)

Defining Excellence in Today’s Practice Manager

ASCENT
ADMINISTRATOR SUPPORT COMMUNITY for ENT
Otolaryngology Resource Network

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# COPM HANDBOOK

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Vision Statement
To be the authority in creating leaders in Otolaryngology practice management who commit to lifelong learning.

Mission Statement
We set the standard for successful otolaryngology practice management through certification and continuing education.

Benefits of Obtaining the COPM Designation
- Sustaining excellence in lifelong learning of otolaryngology practice management
- Demonstration of your commitment to your profession
- Increased value to your patients, physicians and staff
- Personal and professional development
- Formal recognition of your accomplishment
- Authority to use the COPM designation on communication
- Personal satisfaction

Qualifications for Applying to Become a COPM
In order to qualify as a candidate for the COPM Examination, an individual must have a minimum of two years of experience in an ambulatory or other healthcare management position that contributes to the mission of ASCENT-COPM, including at least six months in ear, nose and throat.

Goals of the COPM Advisory Board
- Establish, implement and maintain national certification standards, policies and procedures for the otolaryngology practice management certification.
- Establish, implement and maintain eligibility and examination standards for the COPM program.
- Promote and implement professional credentialing and psychometric methods and procedures for certification in the otolaryngology practice management profession.
- Initiate and foster lifelong learning and sustaining excellence in otolaryngology practice management.
- Implement and develop education content for ASCENT.

Advisory Board
The COPM Advisory Board is the sole organizing body whose responsibility is to develop, implement and monitor the COPM program. The COPM Advisory Board is comprised of leaders in the field who hold the designation and is approved by the ASCENT Executive Committee.

COPM Chair
Danielle DeMaio-DeAngelis, COPM
Thomas Jefferson University Dept. of Otolaryngology
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COPM Co-Chair
Kristine McGriff, COPM
Oregon Health & Science University Dept. of Otolaryngology
Certification Product

The Certification in Otolaryngology Practice Management (COPM) exam is administered at any time of year, at your convenience, via computer-based testing (CBT) on your own device.

Visit the COPM page of the ASCENT website for all the details in order to begin. For more information or to schedule your exam, please contact the ASCENT office at 412-243-5156 or email COPM@askASCENT.org.

Application Term and Fees

Approved applications are valid for a one-year period.

- Application Fee $25
- Exam: Member - first time testing $250
  - Non-member $499
- Re-test within one year (one time) $0
- Re-test after one year $100
- Annual assessment for credentialing $75

After becoming a COPM, you will be billed for the annual assessment fee during your next dues billing cycle.

Exam Cancellation Policy

A cancellation fee of $100 will be assessed. The remainder of the examination fee will be refunded.

Examination Core Competencies

The COPM examination is based on the knowledge required of an otolaryngology practice management professional. That knowledge base is specified within six topic areas designated as practice management "functions." In addition, practice managers must recognize that each function is impacted by or relevant to the "conditions" under which practices are organized. Consequently, examination questions are written to assess an individual candidate's knowledge in terms of practice management functions and the conditions associated with those functions.
The examination is composed of 150 test questions based on the COPM Core Competency areas. Each examination offered is a different examination representing a new selection from the bank of test questions. The COPM Core Competency areas are listed below. The percentages designate the questions from each topic divided by the total questions that may be included in an individual examination.

<table>
<thead>
<tr>
<th>COPM Core Competency Areas</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Basic Otolaryngology Knowledge</td>
<td>10%</td>
</tr>
<tr>
<td>Finance and Accounting</td>
<td>20%</td>
</tr>
<tr>
<td>Marketing and Public Relations</td>
<td>5%</td>
</tr>
<tr>
<td>Operations</td>
<td>35%</td>
</tr>
<tr>
<td>Technology</td>
<td>10%</td>
</tr>
<tr>
<td>Human Resources</td>
<td>20%</td>
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</tbody>
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**COPM Exam Content Outline**  
*Revised January 2018*

I. **Basic Otolaryngology Knowledge -- 10%**
   A. Terminology
   B. Procedures, protocols and patient services
   C. Instrumentation
   D. ENT Anatomy

II. **Finance and Accounting -- 20%**
   A. Terminology
   B. Generally accepted accounting principles (GAAP)
      1. General ledger
      2. Cash flow
      3. Income statement
      4. Depreciation
      5. Balance sheet
      6. Accounts receivable
      7. Accounts payable
      8. Audit trails
   C. Financial Reports
   D. Budgets
   E. Corporate structure and tax implications
   F. Accounting procedures
      1. Internal controls
      2. Protocols
   G. Cost/benefit analysis
   H. Mergers and buyouts
I. Financial Business Relationships
   1. Contracting
   2. Group purchasing
   3. Financing
   4. Corporate partnerships/relationships

III. Marketing and Public Relations -- 5%
   A. Terminology
   B. Patient satisfaction surveys
   C. Marketing strategy/plan
   D. Advertising and promotional programs
      1. Print
      2. Social Media
      3. Promotions
   E. Media and public relations
   F. Referral management
   G. Branding

IV. Operations -- 35%
   A. Operational reports
      1. Productivity
      2. Revenue Cycle Reports
      3. Utilization
      4. Inventory
      5. Staffing Reports
      6. Benchmarking
   B. Policies and Procedures
      1. Clinical Procedures and Competencies
      2. Operational
      3. Business
   C. Practice Improvement and Quality Measures
      1. CMS Programs (Such as PQRS, MU, VBM)
      2. HCAHCPs/CG-CAHPS
      3. Quality and Performance
         i. Indicators/incentives/initiatives
      4. Performance incentives
         i. QRUR
   D. Risk Management
      1. Terminology
      2. Malpractice
      3. Patient relationships (Patient complaints, discharging a patient)
4. Medical records release
5. Business Continuity
6. Disaster Recovery

E. Health Information Management
   1. HIPAA
   2. Fraud and Abuse
   3. HITECH compliance

F. Revenue Cycle
   1. Terminology
   2. Coding and Billing
   3. Documentation requirements
   4. Reimbursement monitoring
   5. Fee schedule

G. Establish and Maintain External Relationships
   1. Vendors
   2. Third-party payors
   3. Contract Review and Negotiation

H. Business and Strategic Planning
   1. Terminology
   2. Planning and Forecasting
   3. Return on Investment
   4. New Business
   5. Mission, Vision and Core Values

I. Facilities Management
   1. Property and facilities
   2. Equipment
      i. Cleaning
      ii. Repair
   3. Supplies
      i. Room stocking
      ii. Inventory Control

J. Provider and staffing operations
   1. Terminology
   2. Workflow
   3. Appointment schedule management
   4. Surgical scheduling
   5. Testing scheduling
   6. Ancillary scheduling
   7. Room utilization
   8. Surgical utilization
   9. Ancillary utilization
10. Credentialing
11. Licensing

K. Patient Communication
   1. Call processing management
   2. Patient portal
   3. Communicating with patients via text, email, and portal
   4. Online scheduling
   5. Patient reminders (cell phone, email)
   6. Patient education

L. Value Based Medicine
   1. Terminology
   2. Reimbursement modules
   3. Reporting

M. Ancillary Services
   1. Audiology
   2. Hearing Aids
      i. Implants
   3. Allergy
   4. Multi-disciplinary clinics
   5. Imaging (CT, Xray, Ultrasound)
   6. Speech Pathology
   7. Aesthetics
   8. Sleep
   9. Voice
10. Balance

N. Research
   1. Terminology
   2. Basic Science
   3. Clinical Trials
   4. Compliance
   5. Reporting

V. Technology -- 10%
A. Terminology
B. Systems
   1. Computer
   2. Phone
   3. Integration of systems (i.e. LANS, WANS, etc.)
C. Hardware and Software
   1. Practice Management software
      i. Business operations
ii. Clinical software

2. Scheduling
3. Claim software

4. EHR
   i. Operational
   ii. Ordering
   iii. Templates
   iv. Documentation
   v. Interoperability
   vi. Utilization Management
   vii. Workflow
   viii. Training

5. Clearinghouse
6. Office applications
7. System maintenance
8. File maintenance
9. Patient portal

D. Telehealth

E. Consumer Health Diagnostics
   1. Wearable
   2. Mobile Apps

VI. **Human Resources -- 20%**

A. Personnel Policies (clinical and non-clinical personnel and providers)
   1. Job descriptions
   2. Recruitment and hiring/onboarding
   3. Retention
   4. Training and development
   5. Discipline and dismissal
   6. Performance Evaluation
   7. Succession Planning
   8. Temporary Work

B. Compensation and Benefit Programs
   1. Salary and benefit surveys
   2. Physician and provider compensation
   3. Incentive plans
   4. Insurance benefits
   5. Retirement benefits
   6. Other benefits:
      i. Wellness programs
      ii. Licensing
iii. Education- Continuing and Advanced Degree
iv. Travel
v. Relocation
vi. Disability
vii. Flex Benefits

C. Human Resource Federal Laws
   1. Department of Labor
   2. Fair Labor Standards Act
   3. Americans with Disabilities Act
   4. Family and Medical Leave Act
   5. Equal Employment Opportunity Commission
   6. Equal Pay Act
   7. Civil Rights Act/Title VII
   8. Age Discrimination in Employment Act
   9. Affirmative Action
   10. Employee Retirement Income Security Act
   11. Worker’s Compensation
   12. Health Insurance Portability and Accountability Act
   13. Consolidated Omnibus Budget Reconciliation Act
   14. Occupational Safety and Health Administration
   15. National Labor Relations Act

D. Leadership Development
   1. Terminology
   2. Communication
   3. Styles
   4. Coaching
   5. Engagement
   6. Personality testing
   7. Personal development
   8. 360° review
   9. Mentorship

Preparing for the COPM Exam
The following resources are available to assist you in preparing for this knowledge-based test:
• Self-Assessment Exam/Tool – $0.00 – Order in the ASCENT Store
• ASCENT Resource Manual – Order in the ASCENT Store
• COPM Study Notes – Order in the ASCENT Store
• On-line COPM Study Group Discussion Board – Access Here
• Live study session with current COPMs at the ASCENT annual educational conference

Key Dates
• Testing Application Deadline: one week prior to the exam
• Examination date: any time of year
• You have one year from the application date in which to take and pass the exam.
• Prior to the examination date, candidates who register will be sent confirmation of the final examination arrangements and applicable instructions.
• Computer-based testing offers results immediately following exam completion.
• Upon successful completion of the exam, a certificate will be sent to you.

Contact the ASCENT Office at 412-243-5156 or COPM@askASCENT.org to schedule your exam.

Recertification
To maintain COPM status, COPM professionals must recertify every two years. The recertification supports on-going practice management work experience and professional development.

Requirements to Re-Certify as COPM
• Current ASCENT member (and payment of $75 annual assessment fee)
  o If not an ASCENT member, payment of $150 non-member assessment fee is required
• Employed in Otolaryngology

Recertification Can Be Accomplished One of Two Ways
1. Obtain Continuing Education Units (CEUs) OR
2. Re-take the current exam and receive a passing score

Recertification by CEU
• A CEU is defined as one (1) contact hour of participation in an organized continuing education experience, excluding meals and breaks.
• CEUs submitted should demonstrate an overall education format representing the COPM competencies:
  o Basic Otolaryngology Knowledge
  o Finance & Accounting
  o Marketing
  o Operations
  o Technology
  o Human Resources
• It is the designee’s responsibility to track and document their CEU activity and enter them into the ASCENT website.
• COPM designees are encouraged to earn 15 CEUs per year in order to reach the recertification requirement of 30 CEUs every 2 years.
• If not an ASCENT member, but wanting to keep the COPM designation, an annual
assessment fee of $150 must be paid to the ASCENT office when submitting the required forms. Contact the ASCENT office for the required forms.

Logging Your CEUs Online

- Obtain certificate of attendance for each CEU activity. When a certificate of attendance is not made available, obtain documentation of registration, agenda, etc.
- Log your CEUs on the ASCENT website. Here’s how:
  - Login to the website
  - Under My Profile in the blue box, select Manage Profile
  - Under Content & Features, select Professional Development
  - Click the Journal Entries tab
  - Click Add Entry
  - Complete all the fields and be sure to enter the expiration date for your credits or the system won’t recognize your credits as being eligible to be a part of your required 30 credits.
  - Recertification is based on calendar year. If you became COPM certified in 2016 - no matter which month or day - your recertification is due at the end of 2018. We recommend that you input 12/31/18 as the expiration for the credits you input for this time frame’s recertification.
  - Within the "Attachments" field, please upload any CEU certificate(s) you’ve received or other documentation supporting your entry.
  - Submit the form once complete
  - Your entry will now be listed on the Journal Entries page
  - Continue adding entries as you receive CEUs. All entries will be reviewed and the status will be changed to "Approved" when the review is complete.
  - Please notify the ASCENT office once all of your CEUs have been entered and you’re ready for us to perform a final review and approve your recertification completion.
  - Upon approval of your recertification, you will receive an updated COPM certificate. You will then begin the process again to complete your recertification in another two years.

Recertification by Reexamination

COPM designees may re-take the COPM exam, within one year prior to certification expiration, in lieu of completing CEUs. If your certification expires at the end of 2018, you need to pass the exam in 2018. The exam can be taken at any time throughout the year on your own computer, at your convenience. You can also take the exam at the ASCENT Annual Educational Conference. A passing score must be achieved in order to obtain recertification. Please contact the ASCENT office if you would like to take the exam in order to re-certify.

COPM Classes – When to Re-Certify

The Association of Otolaryngology Administrators (AOA), now the Administrator Support community for ENT (ASCENT), began certifying otolaryngology practice managers in 2005 with the COPM designation, hence 2005 was the first "class" of COPM designees. From 2005 to 2008, the requirement was that recertification was to be done every 5 years. In 2009, we made a change to the rule and are now requiring recertification every 2 years. Below is a chart to help you understand when you need to re-certify based on the year you originally received your COPM - this is your "class" year. The below chart is a reference and obviously would go on infinitely.

<table>
<thead>
<tr>
<th>COPM CLASS</th>
<th>1st Re-cert Year</th>
<th>2nd Re-cert Year</th>
<th>3rd Re-cert Year</th>
<th>4th Re-cert Year</th>
<th>5th Re-cert Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
<td>2016</td>
<td>2018</td>
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Various educational firms have been pre-approved for CEUs through the ASCENT for their conferences, publications, subscriptions, seminars, audio conferences, etc. Please obtain and provide verification of attendance and hours.

**Conferences**
- Attendance at AllMeds Regional Conference – up to 8 CEUs max – 1 meeting/12-mo period
- Attendance at ASCENT Annual Educational Conference – full credit is 12-15 CEUs
- Presentation at the ASCENT Annual Educational Conference – 3 CEUs per hour of presentation
- Panel Discussion participant at the ASCENT Annual Educational Conf. – 1.5 CEUs per panel
- Presentation at the AAO-HNS Annual Meeting – 3 CEUs per hour of presentation
- Attendance at AAO-HNS Academy Meeting – full credit with certificate, 10 CEUs maximum
- Attendance at MGMA Meeting – 4 CEUs, maximum one meeting per 12-month period
- Users Meetings – management course credit can be utilized from user’s meetings but NOT courses that are specific to your project management software or electronic health records

**Publications/Journals – Writing Articles (maximum of 5 CEUs per year for this category)**
- *Journal of Medical Practice Management* – Greenbranch Publishing – 3 CEUs/12-mo period
- *Fast Practice* – Greenbranch Publishing – 1.5 CEUs per year
- *MGMA Connexion* – 3 CEUs per 12-month period
- *Otolaryngology Coding Alert* – 2 CEUs per 12-month period
- AAO-HNS *Bulletin* – 2 CEUs per article
Local/State Management/Association Meeting
• Attendance at a local MGMA meeting – 1 hour of CEU per meeting
• Attendance at a state ENT society meeting – full credit with certificate
• Attendance at a local ENT society meeting – 1 CEU per meeting
• Presentation at a local ENT society meeting – 3 CEUs per hour of presentation

Seminar/Webinar/Workshop/Web-Based Training
• Attendance at ASCENT sponsored webinar – full credit, usually 1.5 CEUs per webinar
• Presentation of ASCENT sponsored webinar – 3 CEUs per webinar
• McVey Coding Courses – 2 CEUs per course per year with certificate
• MGMA Live and On-Line Courses – full credit with certificate
• Karen Zupko Management Seminars – 3 CEUs per seminar per year
• Karen Zupko Coding Courses – 2 CEUs per course per year

CEUs Not On Pre-Approved List
There are many additional programs, publications, subscriptions, seminars, etc., which are currently not on the pre-approved list. You may submit a request for approval at any time by entering these CEUs in your profile on the ASCENT website and they will be reviewed for approval. If accepted – their continuing education unit credits will be at 50%. Example: You attended a workshop and have a certificate showing 8 hours of attendance, you will be allowed to claim 4 hours of CEUs.

The following information is required for acceptance of non-approved CEUs
• Seminar/Workshop/Web-Based Training
  o Obtain certificate of attendance
  o Title of seminar/workshop with copies of agenda
  o Name of sponsoring organization

• Audio Conferences
  o Obtain certificate of attendance
  o Title of course with copies of agenda
  o Name of sponsoring organization

• Publications/Software
  o Submit name of publication or software
  o Make and keep a copy of the journal/magazine cover (for publications)
  o Save any marketing materials and/or web site reference (for software)

Special Exam Day Accommodations
Any individual who has a physical or cognitive impairment or limitation that prevents him/her from taking the exam under standard testing conditions may request special testing arrangements. The types of accommodations that may be provided include large print, a person to read and/or mark the answer sheet, extended time (if requesting extended time please indicate how much time is needed), and/or a separate testing room.

When submitting the application, include a separate letter and documentation describing:
• the candidate’s disability or special need,
• the specific adaptation requested, and
• documentation from a provider and/or other appropriate diagnostic authority concerning disability and special need.

If religious beliefs prohibit an individual from taking the examination on the scheduled date of an exam, an alternate day may be requested. The request must be accompanied by a letter of confirmation from the individual's clergy.

After reviewing requests, the applicant will receive a confirmation letter from the COPM office confirming the special arrangements that are granted.

**Discrimination**
The ASCENT does not discriminate against any individual on the basis of race, color, religion, sex, sexual preference, national origin, age, disability, or any other characteristic protected by law.

**COPM Frequently Asked Questions**

**Q1: What is the COPM program?**
**A:** The ASCENT provides members with the opportunity to earn the Certificate of Otolaryngology Practice Management through a formal pathway to certification. The COPM designation represents the standard of excellence in today’s otolaryngology practice manager.

**Q2: Why should I obtain the COPM designation?**
**A:** The benefits of obtaining the COPM designation include:
- Sustaining excellence in lifelong learning of otolaryngology practice management
- Demonstration of your commitment to your profession
- Increased value to your patients, physicians and staff
- Personal and professional development
- Formal recognition of your accomplishment
- Authority to use the COPM designation on communication
- Personal satisfaction

**Q3: What do I need to qualify as an applicant?**
**A:** In order to qualify as a candidate for the COPM examination, an individual must have a minimum of two years of experience in an ambulatory or other healthcare management position that contributes to the mission of ASCENT-COPM, including at least 6 months in ear, nose and throat.

**Q4: How do I prepare for the COPM exam?**
**A:** The applicant should take the COPM self-assessment test to help identify areas of weakness. The applicant should also review the COPM Handbook for detailed information. In addition, the ASCENT Resource Manual, based on the core competencies, is available for purchase to help you prepare for the exam. Participate in the on-line COPM study group discussion board.

**Q5: What do I need to do to become a COPM?**
**A:** To apply to take the exam:
1) Complete the application online at [www.askASCENT.org/COPM](http://www.askASCENT.org/COPM) and submit payment.
2) Successfully complete the COPM exam.

**Q6: How can I ask for help or guidance to obtain certification?**
**A:** Contact the ASCENT office or COPM@askASCENT.org or contact a member the COPM Advisory Board. You can also post your question on the COPM on-line study group discussion board.
Q7: What are the core competencies of the COPM examination?
A: The core competency areas consist of Basic Otolaryngology Knowledge (10%); Finance and Accounting (20%); Marketing (5%); Operations (35%); Technology (10%) and Human Resources (20%).

Q8: How do I know in which area I need to concentrate my studies?
A: Check out the ASCENT website, www.askASCENT.org/COPM and look for the COPM Self-Assessment Tool found in the store. You have the ability to assess your knowledge and readiness for the exam by gaining some experience with the type of questions that are asked. At the end of the quiz, you will be scored and a recommendation provided based on your performance on the core competencies.

Q9: I realize the conference and exam date is within a few weeks, but I have been so busy I just haven’t had time to complete it. Can I still send it in?
A: Absolutely. Just complete the application online and submit with the applicable fee.

Q10: What happens if I take the COPM exam and fail?
A: The eligibility for the COPM Examination is valid for a one year period. In the event you do not pass the COPM exam on the first attempt, you may repeat the test one more time for no additional fee.

Q11: For the next exam, I am unable to attend the ASCENT Annual Education Conference. Is there any way I can take the exam?
A: The COPM examination is also offered by computer based testing (CBT). You must take the test on a computer (not a tablet). The CBT exam can be taken at any time of year. There is no charge if you retake the test one time within one year.

Q12: Can I cancel my COPM exam after I have already signed up?
A: Yes, candidates may cancel their registration. Their application fee will be returned, less $100, more than 30 days prior to the exam. Cancellations made less than 30 days prior to the examination and no shows on the day of the examination, will forfeit their entire examination fee.

Q13: I didn’t pass the self-assessment test, why should I try the actual exam?
A: The self-assessment test is not an absolute indicator of testing success. Rather it helps identify the areas you may want to focus your preparation. Most COPM designees study and improve their knowledge base, as very few otolaryngology practice managers are fully skilled in all core competencies.

Q14: Who will know if I don’t pass the exam?
A: The application and testing process is completely confidential. The only people who will know the outcome of your exam are those with whom you’ve personally discussed the outcome.

Q15: What happens if I obtain my COPM designation and later move into a practice management position in a different specialty other than otolaryngology?
A: To maintain your COPM designation, you must pay the assessment fee and submit 30 hours of CEUs every two years. As an active ASCENT member, the assessment fee is $75. If you leave otolaryngology, and become a non-member of ASCENT, you must pay an annual $150.00 assessment fee and submit 30 hours of CEU’s every two years.