Certified Healthcare Access Manager (CHAM)
Exam Content Outline

I. Pre-Arrival (30%)

A. Admission and Transfer Services
1. Manage intra- and inter-facility referrals/transfers
2. Comply with contractual, legal, and regulatory requirements

B. Scheduling
1. Assess expectations and special needs of the patient (e.g., age specific, language service, and physical, cultural and emotional needs
2. Arrange and schedule location, equipment, and/or staff (resources) and document pertinent schedule information
3. Identify service specific requirements prior to scheduling service (e.g., referrals, patient education)
4. Inform patients of clinical prerequisites: Comply with requirements based on physician orders, protocols, and/or medical necessity
5. Inform patients of financial prerequisites and comply with contractual limitations

C. Pre-Registration
1. Create patient account:
   a. Maintain integrity of enterprise master patient index (EMPI)
   b. Obtain patient demographics, guarantor, insurance information

2. Perform financial clearance:
   a. Identify accurate payer/s and plan (e.g., governmental payers, workers compensation)
   b. Meet payer requirements (e.g., validate and procure authorization)
   c. Acknowledge payer/s contractual obligation
   d. Create estimates
   e. Validate eligibility and benefits
   f. Verify eligibility and benefits
   g. Inform and/or collect patient financial obligations (e.g., outstanding balance, bad debt, estimate copay)
   h. Adhere to regulatory compliance standards (e.g., federal, state, and local)
   i. Assist patients with self-pay and financial arrangements
   j. Determine coordination of benefits

II. Arrival (30%)

A. Patient Check-in, Admission, Registration
1. Validate order/referral
2. Provide and explain patient registrations forms
3. Review and obtain signatures on required documents (e.g., HIE, MOON, COA, IMM)
4. Validate ordered levels of care (e.g., inpatient, observation, and outpatient, status changes)
5. Perform point of service collection
6. Notify the insurance of patient admission

B. Patient and Family Experience
1. Deliver quality services and customer satisfaction
2. Facilitate internal and external way finding (e.g., transportation, parking, and drop-off and signage)
3. Identify information to provide to patient and family (e.g., room number, visiting hours, etc.)
4. Manage patient directory exclusions
5. Employ service recovery measures

C. Billing and Collections
1. Capture data elements necessary for accurate billing
2. Collaborate with other departments (e.g., clinical support, health information, billing)
3. Mitigate denials
4. Manage self-pay process

D. Information Technology
1. Demonstrate competency executing daily tasks and utilizing all systems and applications including electronic data interfaces and transactions
2. Outline impact of patient management system transaction (e.g., electronic data interface, electronic medical records and ancillary systems)
3. Demonstrate on system down time process and recovery

III. Access Management (40%)

A. Statistical Reporting
1. Determine benchmark processes to improve outcomes
2. Facilitate process improvement and project management
3. Examine trending areas (e.g., patient flow, and denials)
4. Develop, review, and refine key performance indicators (KPIs), best practices and dashboards

B. Patient Experience and Management
1. Protect patient confidentiality
2. Analyze patient satisfaction surveys (e.g., Press Ganey, Gallup, etc.)
3. Manage patient/customer expectations

C. Professional Development and Competency
1. Develop and set performance standards
2. Manage quality metrics
3. Provide mentoring/coaching for performance threshold

D. Leadership and Management
1. Collaborate with human resource management
2. Demonstrate effective communication
3. Drive strategic planning
4. Adhere to laws, regulations, and guidelines
5. Participate in disaster preparedness
6. Participate in business continuity planning and execution (e.g., remote work, pandemic)
7. Manage financial and workforce performance (e.g., forecasting, budget)
8. Foster employee engagement and development (e.g., conflict resolution, reward and recognition)
9. Guide change management
10. Manage onboarding and continuing education requirements