

Defining Excellence in Today's Practice Manager

**Pathway to
Certification in
Otolaryngology
Practice
Management**

Celebrating more than 25 years of Excellence!



**CERTIFICATION IN
OTOLARYNGOLOGY
PRACTICE
MANAGEMENT**



**ASSOCIATION OF
OTOLARYNGOLOGY
ADMINISTRATORS**

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Vision Statement

*The **Certification in Otolaryngology Practice Management (COPM)**, sponsored by the Association of Otolaryngology Administrators, is awarded to individuals who have demonstrated mastery of core competencies specific to Otolaryngology. The COPM Certification signifies success in a leadership role and the ability to manage a practice in the most professional and resourceful manner.*

Mission Statement

*The **Certification in Otolaryngology Practice Management (COPM)** defines the standard of excellence in today's otolaryngology practice manager.*

Goals of the COPM Board

- Establish, implement and maintain national certification standards, policies and procedures for the otolaryngology practice management profession
- 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 cooperation and collaboration with other otolaryngology-related organizations to promote and sustain excellence in otolaryngology

Certification Product

Certification in Otolaryngology Practice Management – the COPM exam will be administered annually, immediately preceding the AOA Annual Educational Conference, as well as computer based testing (CBT) at approximately 200 sites throughout the United States and Canada. For a current list of sites, visit <http://www.isoqualitytesting.com/mlocations.aspx>.

Advisory Board

The COPM Board is the sole organizing body whose responsibility is to develop, implement and monitor the COPM program. A national Advisory Board for the COPM has been established to review and monitor this program. The Certification Advisory Board is composed of leaders in the field of otolaryngology administration.

Advisory Board Members

Patricia Brown-Oliver, COPM
COPM Chair

Patrice DeLeo, COPM
Mary Henshaw, MBA, COPM
Jeanne Rothamel, RN, CORLN, COPM
Robin L. Wagner, COPM

Rodger Egeland, COPM
Sally R. Kaye, CPA, COPM
Andy Zutter, COPM

Benefits of Obtaining the COPM Designation

- Evidence of commitment to lifelong learning;
- Personal satisfaction and intellectual stimulation;
- Demonstration of your commitment to your profession;
- Recognition of your knowledge and experience, while increasing your value to your patients, physicians & staff, as well as credibility with your peers;
- Professional development that increases knowledge of all aspects of otolaryngology management gained during pathway to COPM certification;
- Networking opportunities with those that share the COPM designation;
- Formal recognition of your accomplishment;
- Authority to use the COPM designation on letterhead, business cards and communications; and
- A certificate attesting to your achievement.

Qualifications for Applying to Become a COPM

The COPM Board evaluates applications on an ongoing basis and a rolling acceptance will be continuous until the application deadlines. The application is based on a point system. Points are awarded for management experience, responsibilities and education. Additional points are accrued by having membership(s) in AOA and other professional management organizations and by making contributions to the profession. The application can be scored for self-assessment of sufficient points.

In order to qualify as a candidate for the COPM Examination, an individual must have:

- Current primary or secondary membership in the Association of Otolaryngology Administrators;
- One year experience in otolaryngology practice management;
- A total of three years medical practice management (*which includes one year in otolaryngology practice management*);
- Current full-time employment in an otolaryngology practice management capacity (*If applicant is currently unemployed, unemployment period must be less than 12 months from the date the application is submitted*); and
- Responsibility and accountability for the successful management of an Otolaryngology practice or group.

The COPM application requires a two-step process in which applicants: (1) demonstrate via a point system their broad range of experience in the field of practice management and (2) successfully complete a written essay explaining why they desire to become a COPM.

To qualify as an applicant, an individual must acquire a minimum of 70 out of 125 possible points. Points are assigned as indicated below within five specific areas of practice management:

- Experience in Otolaryngology Practice Management - 35 points
- Management Responsibility - 25 points
- Education & Continuing Education - 35 points
- Membership in Professional Organizations - 10 points
- Professional Contribution to the Field - 20 points

Applicants are not required to score in all areas to qualify for the examination. Specific information for determining and reporting earned points in each area is included in the candidate application.

Application Term

Approved applications are valid for a two-year period. Candidate must meet the same qualifications during the two-year period.

Exam Cancellation Policy

Candidates may cancel their registration if written notification is received by the AOA at least 30 days prior to the day of the examination. A cancellation fee of \$100 (US) for the written exam and \$150 (US) for computer based testing (CBT) will be assessed. The remainder of the examination fee will be refunded. Cancellations made less than 30 days prior to the exam and no-shows on the day of the exam will forfeit the entire examination fee.

CBT Candidates who have already scheduled their CBT appointment and have received confirmation must contact **BOTH the AOA office and SMT Testing**. SMT can be notified online at www.smttesting.com, or at 800-556-0484 Option 1 (CBT). **Failure to contact BOTH AOA and SMT will result in forfeiture of all exam fees.**

Requests for postponement that are **received** by AOA at least 30 days prior to the scheduled exam date may postpone one time to the next regularly scheduled exam cycle . For candidates opting for computer-based testing, a \$100.00 fee will apply to postponements. Postponing candidates must meet the current eligibility requirements and must pay any fee increases at the time of the next examination cycle.

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 physician 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.

COPM 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.

Basic Otolaryngology Knowledge	10%
Finance and Accounting	20%
Marketing	10%
Operations	30%
Technology 1	0%
Human Resources	20%



Discrimination

The AOA 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.

Key Dates

- Application deadline
 - ◆ AOA Annual Educational Conference written exam: August 1
 - ◆ Computer-based testing: Applications are accepted on a rolling basis and must be received at least 30 days prior to applicant's desired April or October testing date
- Notification of acceptance - Within 2 weeks of receipt of application
- Examination date
 - ◆ Written exam – Wednesday prior to Annual Educational Conference
 - ◆ Computer-based testing: April or October
- Following each application deadline, completed applications are submitted to the COPM Board for review and verification of points indicated.
- You will receive an e-mail no later than two weeks after receipt of application to inform you of the application review results.
- You have two years in which to take and pass the exam. If your application was not approved, we will send you a new blank application stamped "PAID" to reapply.
- Approximately two weeks before the examination date, candidates who registered will be sent written confirmation of the final examination arrangements, including site, room location and time of exam. Candidates opting for the CBT will receive instructions in their acceptance letter of how to register for the test site. You should complete the online examination registration process as soon as you know your personal schedule surrounding the April or October testing date.
- After taking the written exam, it will take approximately 8 weeks to receive your results by mail. The notice will include a test report indicating areas of strength and weakness.
- Computer-based testing offers results immediately following exam completion.
- If you pass the examination, a certificate will be sent to you after you receive your notification letter.

COPM Recertification Program Policies

To maintain COPM status, COPM professionals must recertify every two years. Recertification is required every year if you leave the AOA for a different practice management position in a specialty other than otolaryngology and want to maintain your COPM designation. The recertification supports on-going practice management work experience and professional development. Recertification can be done through continuing education credits or retesting if preferred. Please refer to the **COPM Recertification Requirements and CEU form** for complete details.

COPM Content Outline

Reviewed 5/15/2009

I. Basic Otolaryngology Knowledge -- 10%

- A. Knowledge of basic otolaryngology terminology
- B. Familiarity with basic otolaryngology procedures and protocols
- C. Familiarity with basic otolaryngology instruments
- D. Knowledge about otolaryngology practice triage
- E. Familiarity with customary otolaryngology patient services
- F. Anatomy
- G. Pharmacology relevant to otolaryngology

II. Finance and Accounting -- 20%

- A. Practice generally accepted accounting principles (i.e., GAAP)
 - 1. General ledger
 - 2. Cash flow
 - 3. Income statement
 - 4. Depreciation
 - 5. Balance sheets
 - 6. Accounts receivable
 - 7. Payroll
 - 8. Accounts payable
 - 9. Audit trails
- B. Study and evaluate operations and financial reports
- C. Prepare and monitor budgets
- D. Demonstrate an understanding of corporate structure and its tax implications
- E. Implement and coordinate accounting procedures
 - 1. Internal controls
 - 2. Protocols
- F. Develop a cost/benefit analysis
- G. Practice valuation (what one is, how to do one, who can do one)

III. Marketing -- 10%

- A. Conduct internal and external customer satisfaction surveys
- B. Develop and implement a marketing plan
- C. Design, implement and monitor advertising and promotional programs
- D. Plan and conduct public relations programs
- E. Referral management and development
- F. Develop and implement a marketing strategy

IV. Operations -- 30%

- A. Develop, prepare, analyze and monitor operational reports
 - 1. Productivity
 - 2. Financial
 - 3. Utilization
 - 4. Inventory
 - 5. Human Resources
- B. Identify need, create and implement policies and procedures
- C. Identify, analyze and implement processes for practice improvement
- D. Develop, implement and monitor a compliance program
 - 1. Malpractice
 - 2. Policies and procedures
 - 3. Minimize legal exposure
 - 4. Patient relationships
 - 5. Employee relationships
 - 6. Confidentiality: patients and employees
 - 7. Patient records release
 - 8. Regulatory compliance
 - 9. Coding
 - 10. Documentation requirements
 - 11. Reimbursement monitoring
 - 12. Supervision
- E. Establish and maintain external relationships (i.e., vendors, third-party payors, and referral sources)
- F. Develop, implement and monitor a business and/or strategic plan
- G. Manage and maintain property, facilities, equipment and supplies
- H. Design, implement, and monitor organizational structure
- I. Design, implement, and monitor managed care operations
- J. Establish and maintain fee schedule

V. Technology -- 10%

- A. Analyze and manage Information Systems (IS)
 - 1. Computer systems
 - 2. Phone systems
 - 3. Telemedicine
 - 4. Electronic medical records
 - 5. Integration of systems (i.e., LANS, WANS, etc.)
 - 6. Electronic billing
- B. Technology of IS
- C. Hardware and software
 - 1. System maintenance
 - 2. File maintenance
- D. Database administration

VI. Human Resources -- 20%

- A. Develop and administer personnel policies
 - 1. Job descriptions
 - 2. Recruitment and hiring
 - 3. Retaining
 - 4. Training and development
 - 5. Discipline and dismissal
 - 6. Evaluation
- B. Formulate and administer compensation and benefit programs
 - 1. Salary and benefit surveys
 - 2. Physician compensation
 - 3. Incentive plans
 - 4. Insurance benefits
 - 5. Retirement benefits
 - 6. Other benefits
- C. Understand and comply with federal laws & regulations and guidelines pertaining to personnel (i.e, OSHA, HIPAA, ADA, Equal Pay Act, etc.)
- D. Develop and facilitate communication skills and techniques

COPM FAQs

Q. What is the COPM program?

- A. The AOA provides members with the opportunity to earn the Certificate of Otolaryngology Practice Management through a formal pathway to certification. It represents the standard of excellence in today's otolaryngology practice manager.

Q. What do I need to do to become a COPM?

- A. To apply to take the exam:
- 1) Download the COPM Application from the AOA website, www.oto-online.org/copm ;
 - 2) Complete the application and submit it to the AOA office for review & approval along with the applicable fee;
 - 3) The application is reviewed for eligibility and the candidate is notified accordingly;
 - 4) Qualified applicants may sit for the examination at either of the next two AOA Educational Conferences or on a scheduled date over the next two years at one of the approximately 200 computer-based testing (CBT) centers throughout the United States and Canada.

Q. How do I prepare for the COPM exam?

- A. The applicant should review the COPM Handbook, Content Outline and Suggested Reading List. In addition, a COPM Resource Manual, based on the core competencies, has been developed and recently made available for purchase to help you prepare for the exam. Of course you may also study any other information which you believe will help you review sufficiently for the examination.

Q. Who can I ask for help or guidance to obtain certification?

- A. Other COPM's are participating in a Mentor Program. Contact the AOA office or COPM@oto-online.org and ask for a COPM Mentor. This person will be available to answer questions and provide guidance to you on your pathway to certification.

Q. 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 (10%); Operations (30%); Technology (10%) and Human Resources (20%).

Q. How do I know in which area I need to concentrate my studies?

- A. Check out the AOA website, www.oto-online.org/copm and look for the COPM Self Assessment Test. It is a 30 question online quiz to give you 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 and the core competencies.

Q. I realize the deadline to have my application in for the COPM exam has passed, but I have been so busy I just haven't had time to complete it. Can I still send it in?

- A. An extension may be requested by contacting the Association's Headquarters. If an extension is granted, an expedited fee of **\$100.00** may be required.

Q. Several people in my department including myself sent in applications to be reviewed. All of my colleagues have heard back but I haven't. Can you tell me over the phone if I have been approved?

A. It is against COPM Policy to give out results for qualification over the phone as it is highly confidential. The COPM office will send results in writing or by e-mail in sufficient time for you to prep are for the exam. If you have not received a response to your application after three weeks of the date you mailed it, please contact the AOA at COPM@oto-online.org.

Q. What happens if I take the COPM exam and fail?

A. The eligibility for the COPM Examination is valid for a two year period. In the event you do not pass the COPM exam on the first attempt, you are encouraged to repeat it. We suggest retaking the CBT within six months. If you prefer the Annual Educational Conference option, you should take it at the next annual conference. There is an additional fee to cover the cost of the administration of the second exam. The fee is \$100.

Q. For the next exam, I am unable to attend the AOA Annual Educational Conference. Is there any way I can take the exam?

A. The COPM examination is also offered by computer based testing (CBT) at approximately 200 sites throughout the United States and Canada. The CBT exam will be offered twice a year – April and October. For a current list of sites, visit www.oto-online.org/copm and select the “Test Center Information” link under Get Answers.

Q. 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.**

Q. I have a new address; how should I inform AOA?

A. You may submit your new address via the AOA website, www.oto-online.org, or contact the Association Headquarters at 412-243-5156 or COPM@oto-online.org .

Q. If I have more questions, who should I contact?

A. You may visit the AOA website, www.oto-online.org, or contact the Association Headquarters at 412-243-5156 or COPM@oto-online.org .

Q. What do I need to do to qualify as an applicant?

A. Eligibility to be seated for the COPM exam is based on a system whereby the applicant accrues points derived from actual experience in several aspects of practice management. To qualify as an applicant, an individual must acquire a minimum of 70 out of 125 possible points. Points are assigned as indicated on the next page in five specific areas of practice management:

- Experience in Otolaryngology Practice Management - 35 points
- Management Responsibility - 25 points
- Formal & Continuing Education - 35 points
- Membership in Professional Organizations - 10 points
- Professional Contribution to the Field - 20 points

Applicants are not required to score points in all areas of the application. Specific information for determining and reporting earned points in each area is included in the COPM Application.

Q. Why should I obtain the COPM designation?

A. The benefits of obtaining the COPM designation include:

- Professional & personal development
- The authority to use COPM designation in your title, on your letterhead & business cards, etc.
- Receiving a certificate attesting to your achievement
- Recognition within your profession
- Networking opportunities
- Competitive advantage when seeking employment
- Proof of your professional market knowledge

Q. I haven't take a test in several years, any suggestions?

A. The Mentor program can offer support while you prepare. The self assessment test can provide insight as to the subject matter you need to improve upon. Consult the recommended reading list for articles and books and consider purchasing the COPM Resource manual.

Q. 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.

Q. Who will know if I don't pass the exam?

- A. The application and testing process is completely confidential, overseen by the COPM Advisory Board. Confidentiality is also stressed when a group of candidates are testing at the Annual Educational Conference.

Q. 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 if you leave otolaryngology you must pay a \$100.00 recertification fee and submit 18 hours of CEU's by January 31st each year. Of those 18 hours, 3 must be on the AOA pre-approved list as outlined in the COPM Recertification Requirements found at <http://www.oto-online.org/copm>.

COPM Suggested Reading List

Reviewed 05/15/2009

Note: This is a general knowledge examination and as a manager you may already have reference material that would encompass the core areas. Below is the suggested reading list to assist in your exam preparation¹.



Baum, Neil and Gretchen Henkel. **Marketing Your Clinical Practice: Ethically, Effectively, Economically.** Sudbury, MA: Jones & Bartlett; 2004. Available at www.amazon.com.

Keagy, BA, Thomas MS. **Essentials of Physician Practice Management.** San Francisco, CA: Josey-Boss; 2004. Available from www.amazon.com.

Pavlock, PhD, CPA, Ernest J. **Financial Management for Medical Groups.** 2nd edition MGMA. Available from www.amazon.com. Published in January 2000.

Personnel Management in the Medical Practice. Chicago, IL: AMA Press, 2004. Available from www.ama-assn.org.

Wax, Mark. **Primary Care Otolaryngology.** Alexandria, VA: American Academy of Otolaryngology - Head and Neck Surgery, 2001. Available from <https://www.entnet.org/iweb/Purchase/SearchCatalog.aspx>

www.memag.com – Technology Section

¹ All materials may not be necessary as some of them overlap. The suggested reading list contains several different resources from which to choose in preparation for the exam. These resources are also excellent references to have available in your practice.

COPM Sample Questions

1. ***The practice productivity report is initially used to:***
 - A. identify inconsistencies in volume
 - B. measure costs of all productivity
 - C. identify physician and staff absences
 - D. identify insurance billing problems

2. ***Budgeting for group revenues and expenses are a component of which part of a comprehensive budget:***
 - A. the cash budget
 - B. the capital expenditures budget
 - C. the accounts payable budget
 - D. the profit plan

3. ***One of your physicians performs a total laryngectomy on a patient diagnosed with cancer of the larynx. After this surgery, you know that this patient may be a candidate for:***
 - A. changing their diet to limit fatty and spicy foods
 - B. raising the head of their bed 6" to 8" when lying down
 - C. voice reconstruction as his voice box has been removed
 - D. voice rest for two weeks

4. ***Employees terminated are eligible for COBRA benefits for how long after termination?***
 - A. 6 months
 - B. 12 months
 - C. 18 months
 - D. 24 months

5. ***How many employees must an employer have before it is required to file an EEO-1 employer information report annually as required by EEOC?***
 - A. 10
 - B. 100
 - C. 1,000
 - D. 10,000

- 6. The minimum retention period for time cards is:**
- A. 1 year
 - B. 2 years
 - C. 7 years
 - D. indefinitely
- 7. What is the chief benefit of accrual accounting?**
- A. it more accurately matches expenses and revenues
 - B. it records expenses as they are paid
 - C. it defers expenses and records revenue when collected
 - D. it records receivables when collected
- 8. OSHA training records must be maintained how long from the date of training?**
- A. 3 years
 - B. 7 years
 - C. 3 years after separation of service
 - D. 30 years after separation of service
- 9. The four step approach in developing a marketing plan includes assessing the practice, identifying the market, establishing a plan of action and:**
- A. evaluating the market
 - B. computing the cost
 - C. gauging progress
 - D. measuring results
- 10. What consists of the following eight elements: location, quality, severity, duration, timing, context, modifying factors and associated signs and symptoms?**
- A. Chief Complaint
 - B. History of Present Illness
 - C. Review of Systems
 - D. Physical Exam

Key: 1A, 2D, 3C, 4C, 5B, 6B, 7A, 8A, 9D, 10B