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HESA 230 Healthcare Finance

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HESA 230: Healthcare Finance

Spring 2019

Department of Health Services Administration
College of Professional Sciences
Xavier University

Schedule: Tuesday/Thursday 1:00 - 2:15 PM
Classroom: Hailstones 17
Text Book: Essentials of Healthcare Finance, 8th Edition
Credit Hours: Three Undergraduate Credits
Faculty: Charlie Baverman, MBA, FHFMA
Office: 408 Schott Hall
Office Hours: Tuesday / Thursday by appointment
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E-mail: bavermanc@xavier.edu
Prerequisites: ACCT 200, HESA 101 and HESA 110

Program Director: Dr. Rick Browne PhD brownef@xavier.edu
Program Administrator: Ms. Judy Janzen Med, Schott 404 janzen@xavier.edu
Xavier Writing Center: Conaton Learning Center

Course Description (Directly from the Course Catalog)

Managerial aspects of financial analysis. Includes analysis of financial statements, costs, capital projects, and working capital; Medicare, Medicaid, changes and rate setting under reimbursement schedules; budgeting, return on investment methodology, forecasting, and strategic planning.

HSA Department Mission Statement

In keeping with its Catholic, Jesuit tradition, the mission of the Department of Health Services Administration at Xavier University is to educate knowledgeable, highly skilled, values-oriented future leaders who will contribute to the health of society by continuously improving the management of health related organizations. HSA will accomplish its mission through:

- Challenging students in the classroom and in applied field experiences including internships and administrative residencies
- Developing internal and external collaborative relationships with academicians and with health care practitioners which lead to innovations in teaching as well as in the delivery of health services
- Incorporating research, scholarship, and collaborative projects into the classroom and field work.

Competencies / Student Learning Outcomes for HESA 230

Course Objectives	Student Learning Outcome	Minimum Expected Level of Competence	Method of Assessment
Students will be able to understand and utilize common financial concepts in healthcare decision-making	Be able to use quantitative and qualitative skills to analyze business and healthcare statistical and financial data (BSHSA SLO 1)	2 – Competent-Able to analyze statistical and financial data, and can make some basic interpretations of the results.	Presentations, exams and projects
Students will be able to describe how the cost of healthcare services and the price of healthcare services interact.	Be able to describe how various healthcare services are delivered and reimbursed. (BSHSA SLO 4)	2 – Competent- Identifies delivery methods for various healthcare services, and the reimbursement options available.	Presentations, exams and projects
Students will be able to describe and analyze the impact of policies (i.e., the Affordable Care Act) on healthcare finance.	Be able to describe healthcare delivery systems within broad social, economic, and policy perspectives. (BSHSA SLO 5)	2 – Competent – Demonstrates an ability to discuss healthcare delivery systems within broad social, economic, and policy perspectives.	Presentations, exams and projects
Students will be able to describe and analyze how different financial decisions impact the cost, quality, and access to healthcare services.	Be able to discuss the complexity of coordinating healthcare services and their related services to improve quality, access, and to contain costs. (6)	2 – Competent – Displays an understanding of healthcare coordination and how it may be used to improve quality, access, and cost containment.	Presentations and projects
Students will be able to describe the manner in which regulatory bodies impact financial decision-making in healthcare organizations.	Be able to discuss the impact of regulatory bodies on management. (BSHSA SLO 15)	2 – Competent – Possesses basic knowledge of regulatory bodies, and demonstrates an understanding of how such bodies impact management.	Presentations, exams and projects
Students will be able to describe how technology projects impact cost and outcomes	Be able to discuss how health informatics supports health care in its operations, revenue, quality, or patient care (BSHSA SLO 8)	1 – Basic - Identifies the impact of costs on technology projects and decisions related to those projects	Projects and presentations
Students will be able to relate competition based decisions with the applicable governing laws and regulations	Be able to demonstrate an understanding of the relationship between ethics and the law (BSHSA SLO 13)	1 – Basic - Identifies the impact of laws and regulations on Providers	Group project

Students will be able to relate the impact of management decisions on long term financial results	Be able to describe and discuss different management theories and approaches (BHSA SLO 17)	2 – Competent – Possesses basic knowledge of healthcare management processes and demonstrates an understanding of how to apply those processes in project based scenarios	Individual and group project
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Required Reading: Essentials of Health Care Finance, Eighth Edition, William Cleverley

CLASS SCHEDULE

Session	Topic	Text Chapter	Class Prep Assignment	Assignment Turn-In Date
1/15	Syllabus Review, Introductions and Course Expectations			
1/17	Financial Information and The Decision-Making Process	1	Read Chapter	
1/22	Legal and Regulatory Environment	4	Read Chapter	
1/24	Individual Tech Project Work Session		Come Prepared with Project Concept Ideas	
1/29	Measuring Community Benefit	5	Read Chapter	
1/31	Group Project Work Session		Come Prepared with Project Concept Ideas	
2/5	Health Insurance and Managed Care	7	Read Chapter	
2/7	Individual Tech Project Work Session		Come Prepared with Project Updates	
2/12	Financial Analysis of Alternative Healthcare Firms	12	Read Chapter	
2/14	Group Project Work Session		Come Prepared with Project Updates	
2/19	Strategic Financial Planning	13	Read Chapter	
2/21	Individual Tech Project Work Session		Come Prepared with Project Updates	
2/26	Cost Concepts and Decision Making	14	Read Chapter	
2/28	Mid Term Exam	(1,4,5,7, 12,13,14)	Study Chapters	
3/5	Group Project Work Session		Come Prepared with Project Updates	

3/7	The Management Control Process	16	Read Chapter	Interim Tech Report Due
3/19	Individual Tech Project Work Session		Come Prepared with Project Updates	
3/21	Capital Project Analysis	19	Read Chapter	
3/26	Group Project Work Session		Come Prepared with Project Updates	
3/28	Consolidations and Mergers	20	Read Chapter	Interim Group Project Report Due
4/2	Individual Tech Project Work Session		Come Prepared with Project Updates	
4/4	Capital Formation	21	Read Chapter	
4/9	Group Project Work Session		Come Prepared with Project Updates	
4/11	Working Capital and Cash Management	22	Read Chapter	
4/16	Individual Tech Project Work Session		Come Prepared with Project Updates	
4/18	Developing the Cash Budget	23	Read Chapter	
4/23	Group Project Work Session		Come Prepared with Project Updates	
4/25	Individual Tech Project Work Session		Come Prepared with Project Updates	
4/30	Group Project Work Session		Come Prepared with Project Updates	Final Tech Report Due
5/2	Group Project Presentations		Prepare / Rehearse PowerPoint Presentation	
5/7	Final Exam	(16,19,20,21,22,23)		

GPA Requirement for Health Services Administration Majors:

Students must maintain an overall combined major/concentration GPA of 2.67. This GPA is made up of all courses taken in the major and concentration (HESA courses), and equates to a B- average for all major courses. If the student is to change concentrations, grades from their first concentration still apply to the calculation of this GPA. See the program website for a full description of the policy.

Inclusivity Statement:

The Department of Health Services Administration and its faculty and staff are committed to providing an atmosphere for learning that respects diversity, in which all students feel comfortable and safe to learn, and in which all students feel like valued members of the HSA community. We are committed to addressing issues that put such an atmosphere in jeopardy, and to being active allies to diverse students. In order to build a positive classroom community, we ask that students:

- Appreciate the opportunity that we have to learn from each other in this community;
- Share their unique experiences, values and beliefs;
- Be open to the views of others;

- Honor the uniqueness of their peers;
- Communicate in a respectful manner;
- Keep confidential discussions that the community has of a personal (or professional) nature;
- Utilize this opportunity together to discuss ways in which we can create an inclusive environment in this course and across the Xavier community.

Attendance Policy: Reasonable attendance at all class meetings is expected. If a student is unable to attend a class, **the responsibility of missed class content is the sole responsibility of the student.** Tests and written assignments will include content covered in class or in the assigned readings. See University Catalogue.

Attendance Procedure:

- 1) You will be documented as **present** if you are in class and on time.
- 2) The instructor will document student attendance.

3) Excused absences include:

- 1) A funeral, with a program, obituary or holy card
- 2) A required activity for another class or university sponsored athletic event, with a memo from the professor or program director
- 3) A documented medical event, with dated, timed and signed documentation (all other Protected Health Information may be redacted)
- 4) A documented legal event, with dated, timed and signed documentation (all other confidential information may be redacted)

You have **one week from the date of your return** to class to submit documentation for excused absences to your instructor. Failure to submit documentation within one week will result in your absence being unexcused.

4) Unexcused absences

Unexcused absences include, for example:

- Social events, such as weddings, parties, etc.
- Events related to outside employment, such as job training, orientation, business travel, etc.
- Personal travel, such as leaving campus early or coming back late from a holiday break
- Problems due to poor planning on your part, such as missing class due to oversleeping or exhaustion due to staying up all night to complete an assignment, etc.

You are allowed a specified number of unexcused absences without penalty.

- One unexcused absence for courses that meet once per week
- Two unexcused absences for courses that meet twice per week
- Three unexcused absences for courses that meet three times per week

You are advised to save these “free” days for unavoidable weather, minor illness and personal events.

Penalty: Unexcused absences, greater than the number specified above, will result in the reduction of the student’s final grade of 1.5% for each unexcused absence.

- 5) Final determination is at the discretion of the instructor for the course. Courses with teams, projects and community service may have additional specifications.

Assignments:

All assignments will have a description that is available via Canvas. All papers and the group project should be written utilizing APA format. Purdue University has a very helpful resource for APA style, utilize the following website:

https://owl.purdue.edu/owl/research_and_citation/apa_style/apa_formatting_and_style_guide/general_format.html

Individual Tech Project: Propose the addition of a new technology product for a healthcare provider that will either lower cost or improve patient care/experience. There is an interim report and final report due that should include a section on strategy, a section on tactics and implementation and a business plan. The business plan should project associated volumes, revenues, expenses and margin over a 5-year period. The individual tech project interim and final reports should also be turned in via Canvas.

Group Northern Kentucky Market Project: The class will be split up between 4 groups representing major players competing in the Northern Kentucky healthcare market. These entities are St. Elizabeth Healthcare, Christ Hospital Health Network, Anthem Insurance and Cincy Ortho. Each group is task with developing a plan for future success. There is an interim report due and a final group presentation. The interim report and group presentation should include an overview of the organization, a section on strategy, a section on tactics and implementation and a business plan. The business plan should project associated volumes, revenues, expenses and margin over a 5-year period. The interim group project report should be turned in via paper. The final group project report is presentation only, no written report to be done.

Exams

There will be two exams for this course: a midterm and a final. The final exam is NOT cumulative; it will cover material from the midterm on. Both exams are intended to cover material from the textbook.

Active Participation:

- Being in class
- Being on time to class
- Being awake and alert in class, not focused on other things (i.e. other homework or activities)
- Asking questions
- Offering your perspectives
- Sharing information
- Being active in small group activities
- Showing respect to your classmates, guests, faculty, etc.

Business Casual Dress:

Business casual dress is expected on days where a speaker is coming to our class, and for student presentations. Business casual dress includes:

- Slacks or khakis, not wrinkled!
- Dress shirt or solid color polo shirt, not wrinkled
- Jacket (though not required of business casual)
- Tie (though not required of business casual)
- Dress shoes (not tennis shoes)
- Skirts (dress, not casual)
- Blouses

- Shoes not open-toed

Canvas

The syllabus, assignment descriptions and announcements will all be available via Canvas. In the spirit of sustainability, such materials will not be printed off and handed out in class.

Papers and article reviews should be turned in via Canvas through "Turnitin". These assignments will be graded via Canvas.

Academic Honesty

"The pursuit of truth demands high standards of personal honesty. Academic and professional life requires a trust based upon integrity of the written and spoken word. Accordingly, violations of certain standards of ethical behavior will not be tolerated at Xavier University. These include theft, cheating, plagiarism, unauthorized assistance in assignments and tests, unauthorized copying of computer software, the falsification of results and material submitted in reports or admission documents, and the falsification of any academic record including letters of recommendation. All work submitted for academic evaluation must be the student's own. Certainly, the activities of other scholars will influence all students. However, the direct and unattributed use of another's efforts is prohibited as is the use of any work untruthfully submitted as one's own. Penalties for violations of this policy may include one or more of the following: a zero for that assignment or test, an "F" in the course, and expulsion from the University. The dean of the college in which the student is enrolled is to be informed in writing of all such incidents, though the teacher has full authority to assign the grade for the assignment, test, or course. If disputes of interpretation arise, the student, faculty member, and chair should attempt to resolve the difficulty. If this is unsatisfactory, the dean will rule in the matter. As a final appeal, the academic vice president will call a committee of tenured faculty for the purpose of making a final determination."

Faculty Note

In addition to the above (taken directly from the University Catalog), please be aware that cutting and pasting from the Internet is plagiarism, and will be treated in the same manner as any other type of plagiarism. If you use more than three words written by someone else, I expect it to be in quotes. When you are writing you should use your own words and thoughts, not those of anyone else. You may not take a sentence and change one to two words and call it your own.

Technology Policy

Students may utilize laptops or tablets during class ONLY for class-related activities. This would include note taking, viewing lecture power points, or viewing other class-related materials. Other use of technology (i.e. social networking, viewing unrelated websites, doing other homework, etc.) is not acceptable. The instructor reserves the right to prohibit students who abuse this policy from using technology during class.

Students with Disabilities

Qualified students with disabilities who will require disability accommodations in this class are encouraged to make their requests to me by sharing their Accommodation Letters with me at the beginning of the semester either during office hours or by appointment. Disability related information is

confidential. If you have not previously contacted Disability Services, I encourage you to do so by phone at 513-745-3280, in person on the Fifth Floor of the Conaton Learning Commons, Room 514, or via e-mail to Cassandra Jones at jonesc20@xavier.edu , to coordinate reasonable accommodations as soon as possible as accommodations are not retroactive.

It is my goal that this class be an accessible and welcoming experience for all students. If you are a student with a disability who may have trouble participating or effectively demonstrating learning in this course, contact me to arrange an appointment to share your Accommodation Letters from Disability Services and to discuss your needs. Disability related information is confidential. If you have not contacted Disability Services (located in the Learning Assistance Center) to arrange accommodations, I encourage you to do so by contacting Cassandra Jones, by phone at 513-745-3280, in person on the Fifth Floor of the Conaton Learning Commons, Room 514, or via e-mail at jonesc20@xavier.edu as soon as possible as accommodations are not retroactive.

Late Assignment Policy

Late assignments may accrue a penalty of 10% per day the assignment is late. An assignment is considered one day late if it is submitted past the identified due date/time. It is considered two days late if it is submitted any more than 24 hours past the identified due date/time, and so forth. This includes weekends! Once an assignment is more than 10 days late, it will become a zero and will not be accepted for credit.

If a student wants an extension for an assignment, this must be received no less than 48 hours before the assigned due date/time. Extensions are not guaranteed, and are at the discretion of the instructor. Extensions may include a late penalty.

Final Grade

Your final grade will be determined via the following manner:

Mid-Term Exam	20%
Interim Tech Report	10%
Interim Group Project Report	10%
Tech Final Report	20%
Group Project Presentation	20%
Final Exam	20%

Grading Scale (Note: .5% will be rounded up)

A	94-100
A-	90-93
B+	87-89
B	83-86
B-	80-82

C+	77-79
C	73-76
C-	70-72
D+	67-69
D	60-66
F	below