

Society of Defense Financial Management Certified Defense Financial Manager - Healthcare (CDFM-H) 2025 Blueprint for Operational Examination

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Overview

This document presents the 2025 CDFM-H blueprint for the operational examination. This blueprint was created based on the extensive thought and effort from Society of Defense Financial Management, the Defense Health Agency (DHA), and HumRRO staff, but especially the input of numerous subject matter experts who participated in the job analysis and blueprint workshops. The percentage weight and number of items on the original blueprint were revised based on the results of the operational pilot examination conducted in Summer 2025.

For the CDFM-H, we indicate the four domains (competencies) included, a description of the domain, and a list of more specific knowledge statements tested. Table 1 indicates the relative weights (percentage of exam questions) for each domain. Finally, a list of applicable references (study materials) is provided.

Exam Blueprint Domains, Descriptions and Knowledge Statements

Strategic Planning (21.3%). The competency area covers knowledge of strategic planning within Federal/DoD healthcare systems, including an understanding of the processes and factors that drive the planning, execution, resource allocation, and assessment phases within these organizations.

- Knowledge of strategic planning process in healthcare delivery organizations with a focus on Federal/DoD hospitals and clinics
- Knowledge of the Unified Medical Program and Budget components including Defense Health Program appropriations, MILPERS, MILCON, and MERHCF
- Knowledge of the healthcare strategic environment and relevancy of Federal/DoD Sector: population (beneficiary mix), core services, product lines, revenue sources, and healthcare workload
- Knowledge of Federal/DoD healthcare golden triangle: people, programming, and performance
- Knowledge of pillars of healthcare: regulatory, reimbursement, competition, and technology
- Knowledge of other sources of resources including reimbursables, public collections, inter-agency, and other military department appropriations
- Knowledge of healthcare capital investment and divesture planning and systems analysis (infrastructure, facility, and equipment planning)
- Knowledge of Federal/DoD healthcare mission capabilities in hospitals and clinics

- Knowledge of joint military medical and civilian personnel
- Knowledge of Federal/DoD healthcare statement of operations and assessments
- Knowledge of Federal/DoD medical workforce acquisition and portfolio management
- Knowledge of relevant applied business and healthcare laws and fiscal law implications
- Knowledge of capitation, fees for service, and accountable healthcare organizations

Management Controls (33.3%). This competency area covers knowledge of management principles within healthcare delivery organizations, including organizational structures, roles, and functions that underpin the medical delivery and readiness system and ensuring operational readiness, optimal performance, and financial controls.

- Knowledge of roles, functions, relationships, and governance as it relates to healthcare policy, healthcare administration, and healthcare delivery
- Knowledge of the perpetual planning process for monitoring management controls and forecasting
- Knowledge of the risk management and internal control process
- Knowledge of hiring mechanisms and healthcare manpower management: personnel control rosters and targets
- Knowledge of operationalizing management controls through cost accounting
- Knowledge of programming and budgeting as basis of performance measurements and accountability
- Knowledge of time-keeping protocols and reporting
- Knowledge of use of business councils and committees (governance) for facilitating resource management
- Knowledge of healthcare business case analysis and cost benefit analysis
- Knowledge of establishing financial management performance metrics, measurement, and reporting
- Knowledge of data quality management and forums
- Knowledge of network partners and collaboration agreements (e.g., CRADA, ISA, RSA, civilian agencies, memorandum of agreements/understanding, affiliation and training agreements)
- Knowledge of business planning and strategic goals in Federal/DoD military treatment facilities and impact on military readiness (quality and safety from a finance perspective and growth perspective, and people)

Operational Tasks and Controls (36.0%). This competency area covers knowledge of cost management, quality improvement, and efficient resource utilization.

- Knowledge of performance-based budgets
- Knowledge of variance analysis
- Knowledge of labor management and concepts of hours per patient day and units
- Knowledge of healthcare quality and safety measures
- Knowledge of budgeting control management (EOR, program element, commodity/object classes)
- Knowledge of medical supplies and pharmaceuticals run rates and management
- Knowledge of operationalizing and balancing value, performance, and quality measures (value chain management)
- Knowledge of revenue cycle management
- Knowledge of healthcare program and performance analysis
- Knowledge of healthcare operations analysis and process improvement
- Knowledge of accounting principles and auditing in healthcare
- Knowledge of maintaining proficiency of the medical workforce
- Knowledge of performance evaluation and incentive compensation for specialized skillsets
- Knowledge of roles, responsibilities, and actions required for active contract management (e.g., de-obligations, sequencing)

CFO Leadership and Management Principles (9.3%). This competency covers knowledge of the multifaceted role of the Chief Financial Officer (CFO) within healthcare organizations, highlighting strategic leadership, organizational acumen, financial stewardship, and operational excellence.

- Knowledge of leadership challenge (leadership styles and impacts), leading organizations and teams, decision-making framework, and problem solving
- Knowledge of healthcare CFO organization, roles and functions, including total quality management and battle rhythms
- Knowledge of healthcare risk integration, mitigation, and management
- Knowledge of how to manage effective meetings and presentations
- Knowledge of leader/self development (e.g., training, growth, mentorship)

- Knowledge of CFO as a strategic planner and thinker (e.g., analytics, business intelligence, high impact behaviors, change management)
- Knowledge of conflict management and negotiation strategies and tactics
- Knowledge of protocols with labor unions, managing in changing environments and transitions
- Knowledge of CFO continuity, organizational development and training

Table 1. CDFM-H Examination Blueprint

Domain	Final Weight	Number of Questions on 75-item exam
Strategic Planning	21.3%	16
Management Controls	33.3%	25
Operational Tasks and Controls	36.0%	27
CFO Leadership and Management Principles	9.3%	7
Total	100%*	75

*Note: The weights equal 99.9% and round to 100%.

Reference Materials

The recommended reference materials for the CDFM-H are provided in Appendix A. Additional resources that may be helpful in preparing for the CDFM-H are provided in Appendix B.

Appendix A – Recommended References

- 2015 IDA Report: "Analyses of Military Healthcare Benefit Design and Delivery"
- 31 USC 3729, Section 3729(a), "False Claims Act."
- Army Leadership and the Profession ADP 6-22 (Department of Army)
- DCFM Financial Management Guide Annex A and Annex G
- Defense Primer: Military Health System 2022
- DHA FY25-27 Performance Planning Guidance
- DHA PI 1100.01: Guidance for Manpower Program
- DHA PI 6010.01: Healthcare Benefit Eligibility Verification and Patient Registration Procedures
- DHA Strategic Plan 0001.01 Manpower & Resourcing Strategic Plan
- DHA-IPM 18-001: Standard Appointing Processes, Procedures, Hours of Operation, Productivity, Performance Measures and Appointment Types in Primary, Specialty, and Behavioral Health Care in Medical Treatment Facilities (MTFs)
- DHA-PI 6025.04: Pain Management and Opioid Safety in the Military Health System (MHS)
- DHA-PM 6010.13: Medical Expense and Performance Reporting System (MEPRS) for Fixed Military Medical and Dental Treatment Facilities (DTFs): Business Rules
- DHA-PM 6015.01: Military Medical Treatment Facility (MTF) Uniform Business Office (UBO) Operations
- DHA-PM 6025.13 Clinical Quality Management in the Military Health System, Volume 1
- DHA-PM 6025.13: Clinical Quality Management in the Military Health System Volume 4: Credentialing and Privileging
- DHA-TM 7220.01: Defense Health Program (DHP) Common Cost Accounting Structure (CCAS) Guidance
- DMHRSi Labor Cost Assignment (LCA) User Manual
- DoD 7000.14-R Financial Management Regulation Volume 2B, 4, 5, 6B, 10, 12
- DoD Directive 5105.79: DoD Senior Governance Framework
- DoD Directive 5136.13: Defense Health Agency
- DoD Instruction 1100.22: Guidance for Determining Workforce Mix

- DoD Instruction 1322.24: Medical Readiness Training
- DoD Instruction 4000.19: Support Agreements
- DoD Instruction 5010.40: DoD Enterprise Risk Management and Risk Management and Internal Control Program
- DoD Instruction 6025.13: Medical Quality Assurance and Clinical Quality Management in the Military Health System
- DoD Instruction 6025.20: Medical Management (MM) Programs in the Direct Care System (DCS) and Remote Areas
- DoD Instruction 6040.40: Military Health System (MHS) Data Quality Management Control (DQMC) Program
- DoD Instruction 7000.14-R, Volume 8, Chapter 2 and Chapter 3
- DTM 24-003: Military Health System Manpower Requirements Determination, Resourcing, and Assignment
- Evaluation of the TRICARE program, <https://www.health.mil/Military-Health-Topics/Access-Cost-Quality-and-Safety/Health-Care-Program-Evaluation/Annual-Evaluation-of-the-TRICARE-Program>
- FAR 4.1603(a) as referenced in JOPEC Handbook Slides
- Field Manual 6-0: Commander and Staff Organization and Operations (Department of Army)
- Field Manual 6-22: Leader Development (Department of Army)
- FY2025 Business Guidance 19 Sept 2024
- GAO Greenbook, Principle 6 and Principle 10
- Gapenski's Understanding of Healthcare Finance Management, Chapter 17 Financial Risk Management
- <https://accountinginsights.org/enhancing-healthcare-budgeting-with-variance-analysis/>
- <https://health.mil/Reference-Center/Presentations/2019/02/11/Quadruple-Aim-Performance-Process-Transforming-Performance-Improvement>
- Maj_Mathew RM_101_ver_2
- Medical Leaders Identify Personal Characteristics and Experiences that Contribute to Leadership Success in Medicine (pmc.ncbi.nlm.nih.gov)
- Office of the Under Secretary of Defense (Comptroller)/Chief Financial Officer (March 2024): Defense Budget Overview FY 2025

- OMB Circular No. A-123, Management's Responsibility for Enterprise Risk Management and Internal Control
- Public Law 106-259: Department of Defense Appropriations Act, 2001 (Sec. 8100)
- Public Law 106-79: Department of Defense Appropriations Act, Section 8157
- Richard G. Malish, Capitation as an Incentive for Transitioning to Patient-Centered Medical Homes in the United States Army: A Brief Report, *Military Medicine*, Volume 181, Issue 10, October 2016, <https://doi.org/10.7205/MILMED-D-15-00541>
- Stabilizing and Improving the Military Health System - Deputy Secretary of Defense Memo
- Strategic Leadership Primer 4th Edition

Appendix B – Additional Resources

- Aug 08, 2022, Office of the Under Secretary of Defense P&R Memo, Transparency of Military Medical Personnel and Clinical Readiness Data
- Brown Book The Enlisted Force Structure
- DHA Strategic Plan FY23-28
- DHA-PI 6025.11: Processes and Standards for Primary Care Empanelment and Capacity in Medical Treatment Facilities (MTFs)
- DoD Instruction 6025.18: Health Insurance Portability and Accountability Act (HIPAA) Privacy Rule Compliance in DoD health Care Programs
- DoD Instruction 6040.42: Management Standards for Medical Coding of DoD Health Records
- DoD Manual 4140.01: DoD Supply Chain Materiel Management Procedures: Make and Maintain Materiel
- Joint Publication (JP) 4-02: Health Service Support
- Maj_Mathew RM_201_ver_2
- PDI 2024 PPT_Mr. Goodman_overview
- TRICARE Reimbursement Manual 6010.64-M, April 2021