

Strata Decision Technology

StrataJazz[®] Class Directory

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Certification Overview

The StrataJazz® Administrator Certification Program empowers all StrataJazz® system administrators to confidently and independently manage your StrataJazz® system. We host our program classes in our state-of-the-art training center in downtown Chicago. We also offer our classes via live, online classes. With classroom/online training, hands-on exercises, enhanced system architecture documentation, how-to guides, and access to our experts, you leave training better equipped to maintain and optimize your StrataJazz® application and support your end users. You also begin to develop a network of other advanced StrataJazz® administrators who can be valuable resources as new challenges emerge.

Certification includes a class and assessment, each offered separately. The classes give you the knowledge needed to administer your chosen StrataJazz® module, while the assessment, which includes a test and a project, lets you demonstrate your knowledge to earn a module certification. This document outlines the classes we offer.

Strata offers the following classes in order to support new administrators become system experts. Review this guide for information regarding class overview, topics covered, and recommended training path.

Solution	Class
Cross- Solution	General Platform Features
	Ad Hoc Reporter – DS
	Ad Hoc Reporter – FP
Advanced Planning	Capital Planning
	Management Reporting
	OnePlan Budgeting
	Strategic Planning: Rolling Forecasting
Decision Support	Analytics
	Cost Accounting Level 1 – Fundamentals
	Cost Accounting Level 2 – Advanced Concepts
	Contract Analytics

Cross-Solution

General Platform Features

Program Description - In this class, you learn the basics about the StrataJazz® system as a new administrative user. This includes navigation, security, and an introduction to how data is used and stored. This is the only class in this document that does not offer a certification. However, this class is a non-mandatory prerequisite for the rest of the classes.

Program Level – Basic

Instructional Delivery Method – Group Live

Prerequisites – None

Advanced Preparation - None

Topics in Order:

- Accessing the StrataJazz® System
- Core Security
- Data Overview
- System Tasks
- Additional Assistance

Ad Hoc Reporter

There are two different offerings for Ad Hoc Reporter. The learning objects are the same for both classes, however, the report we build in class is solution-specific. You are welcome to take either one.

Ad Hoc Reporter (Financial Planning)

Program Description - In this class, you learn the functionality needed to create and maintain Ad Hoc Reporter, in addition to confidently supporting other reporting users in your organization. In addition to Ad Hoc Reporter, we also review building executive dashboard. This class covers concepts that apply to reporting for all StrataJazz® solutions; however, for this specific class, we focus on building a Financial Planning report.

Ad Hoc Reporter (Decision Support)

Program Description - In this class, you learn the functionality needed to create and maintain Ad Hoc Reporter, in addition to confidently supporting other reporting users in your organization. In addition to Ad Hoc Reporter, we also review building executive dashboards. This class covers concepts that apply to reporting for all StrataJazz® solutions; however, for this specific class, we focus on building a Decision Support report.

Program Level – Basic

Instructional Delivery Method – Group Live

Prerequisites – General Platform Features

Advanced Preparation - None

Topics in Order (same for both classes):

- Reporting Navigation
- Basic Report Build
- Report Security and Access
- Additional Editing, Formatting, and Filtering Options
- Calculated Columns and Rows
- Charts
- Solution-Specific Tips and Tricks
- Executive Dashboards
- Testing and Troubleshooting

Recommended StrataJazz® Learning Path:



Advanced Planning

Capital Planning

This section provides an overview of the Capital Planning class offered along with the recommended training path for a new administrator.

Capital Planning – Fundamentals

Program Description - In this class, you learn all the tools and processes you need to maintain the fundamental components of the Capital Planning module, including system administrator responsibilities and troubleshooting.

Program Level – Intermediate

Instructional Delivery Method – Group Live

Prerequisites

- See graphic below.
 - If you have been through a StrataJazz® implementation in the last 2 years or have been using the system regularly for 1-2 years, you do not need to take the below system prerequisites, but if you're new to the system, please follow the recommended StrataJazz® learning path.

Advanced Preparation – None

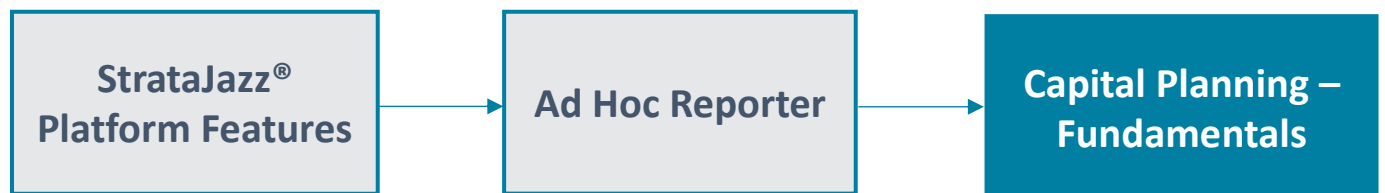
Learning Objectives:

- Create Capital projects
- Get Capital project approved through your organization
- Get your organizations data into your StrataJazz® system

Topics in Order:

- Security Overview, Users, and Role Assignments
- Updating the Grid
- Reviewing a Plan
- Standard Reports
- Managing Workflow
- Dimension Management
- Data Flow
- System Center
- Troubleshooting
- Integration with Other Modules

Recommended StrataJazz® Learning Path:



Management Reporting

This section provides an overview of the Management Reporting class offered along with the recommended training path for a new administrator.

Management Reporting – Fundamentals

Program Description - In this class, you learn all the tools and processes you need to maintain and roll over the Management Reporting module in addition to confidently educating and supporting other users of the module in your organization.

Program Level – Intermediate

Instructional Delivery Method – Group Live

Prerequisites

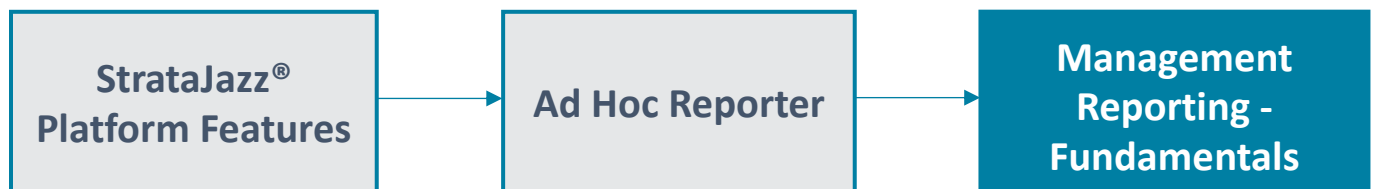
- See graphic below.
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Advanced Preparation - None

Topics in Order:

- Role Assignments
- Solution Review
- Available Reports
- Data Flow
- System Center
- Troubleshooting
- Integration with Other Modules
- Monthly Maintenance Steps and Rollovers

Recommended StrataJazz® Learning Path:



OnePlan Budgeting

This section provides an overview of the Operating Budgeting class offered along with the recommended training path for a new administrator.

OnePlan Budgeting

Program Description - In this class, you learn all the tools and processes you need to maintain and roll over the OnePlan Budgeting module in addition to confidently educating and supporting other users of the module in your organization.

Program Level – Intermediate

Instructional Delivery Method – Group Live

Prerequisites

- See graphic below.
 - If you have been through a StrataJazz® implementation in the last 2 years or have been using the system regularly for 1-2 years, you do not need to take the below system prerequisites, but if you're new to the system, please follow the recommended StrataJazz® learning path.

Advanced Preparation – None

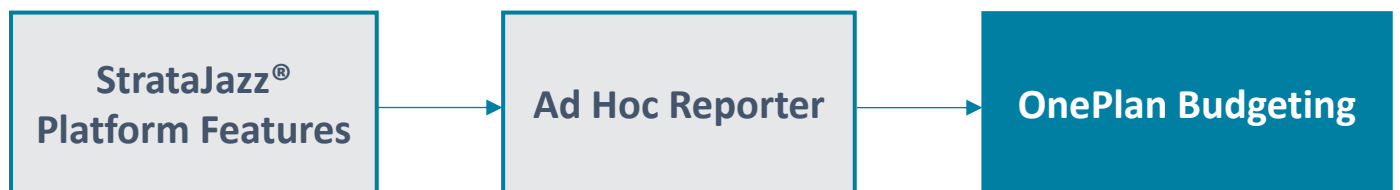
Learning Objectives:

- Understand how to complete a budget as a manager
- Run reports to aid the budget process
- Understand the approval process for a budget
- Update your budget settings at a system level
- Update your budget settings at an entity level
- Change your departmental budget targets
- Finalize your budget

Topics in Order:

- Introduction to StrataJazz® OnePlan® Budgeting
- My Budgets: End User Training
- Updating the System: Administrator Training
- Updating your Target: Plan Editor
- Finalizing you Budget

Recommended StrataJazz® Learning Path:



Strategic Planning – Rolling Forecasting

This section provides an overview of the Strategic Planning classes offered along with the recommended training path for a new administrator.

Strategic Planning – Rolling Forecasting

Program Description - In this class, you learn all the tools and processes you need to maintain and roll over the Rolling Forecasting model for the Strategic Planning module. In addition, you will learn to create new initiative forecasts and troubleshoot common issues.

Program Level – Intermediate

Instructional Delivery Method – Group Live

Prerequisites

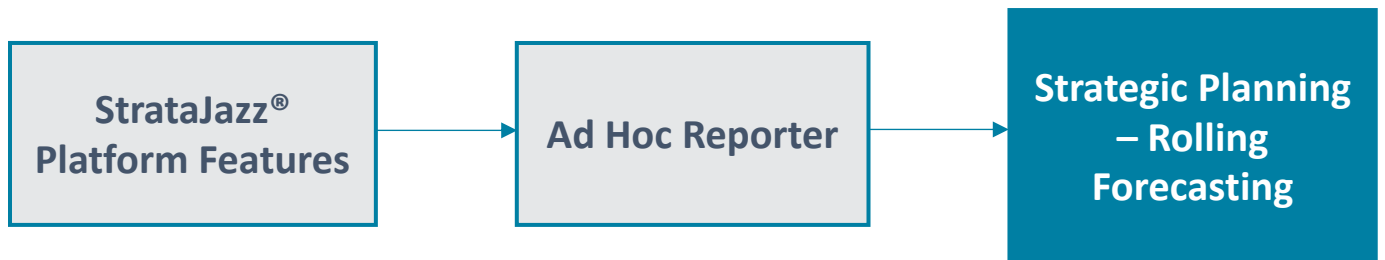
- See graphic below.
 - If you have been through a StrataJazz® implementation in the last 2 years or have been using the system regularly for 1-2 years, you do not need to take the below system prerequisites, but if you're new to the system, please follow the recommended StrataJazz® learning path.

Advanced Preparation - None

Topics in Order:

- Navigating Strategic Planning
- Rolling Forecasting Model Deep Dive
- Plan Form
- Data Studio
- Initiatives
- Standard Reports
- Strategic Planning Specific Security
- Data Flow Walkthrough
- Troubleshooting

Recommended StrataJazz® Learning Path:



Decision Support

Analytics

This section provides an overview of the Analytics class offered along with the recommended training path for a new administrator.

Analytics

Program Description - In this class, you learn the fundamentals and tools needed to create and maintain patient populations, service lines, and calculated system fields. Following successful certification in this class, the expectation is that you are able to handle essential build, maintenance, and troubleshooting tasks.

Program Level – Intermediate

Instructional Delivery Method – Group Live

Prerequisites

- See graphic below.
 - If you have been through a StrataJazz® implementation in the last 2 years or have been using the system regularly for 1-2 years, you do not need to take the below system prerequisites, but if you're new to the system, please follow the recommended StrataJazz® learning path.

Advanced Preparation – None

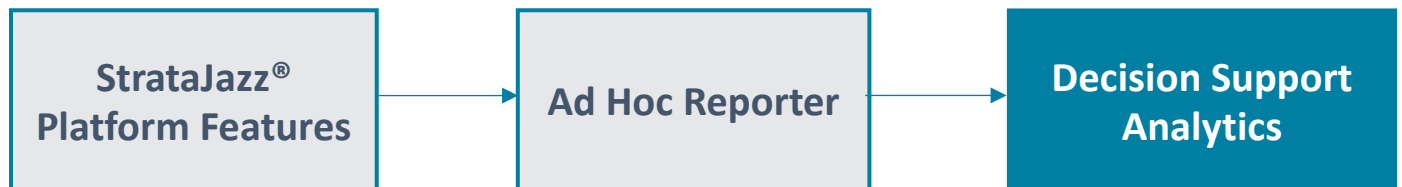
Learning Objectives:

- Create and maintain service lines
- Create and maintain patient populations
- Create meaningful reports based on service lines and patient populations

Topics in Order:

- Rule Building
- Patient Populations
- Service Lines
- Calculated System Fields

Recommended StrataJazz® Learning Path:



Cost Accounting

This section provides an overview of the Cost Accounting classes offered along with the recommended training path for a new administrator.

Cost Accounting Level 1

Program Description - In this class, you learn the fundamentals needed to be an effective and independent administrator of the Cost Accounting module of Decision Support. Following successful certification in this class, the expectation is that you are able to handle essential build, maintenance, and troubleshooting tasks.

Program Level – Intermediate

Instructional Delivery Method – Group Live

Participants will earn 5.0 CPE credits.

Fields of Study:

- 1 CPE - Specialized Knowledge
- 4 CPE - Computer Software & Application

Prerequisites

- See graphic below.
 - If you have been through a StrataJazz® implementation in the last 2 years or have been using the system regularly for 1-2 years, you do not need to take the below system prerequisites, but if you're new to the system, please follow the recommended StrataJazz® learning path.

Advanced Preparation - None

Learning Objectives:

- Define Cost Accounting
- Configure dimensions for costing
- Configure a cost model
- Update and maintain a cost model

Topics in Order:

- Update Data Sets for Costing
- Importing Manual Statistics
- Cost Model Overview
- Statistic Drivers
- Department Categorization
- Reclassification
- Variability
- Charge Allocation
- Cost Audit
- Run Costing
- Validate Data
- Publish Costing Configuration
- Simple Troubleshooting and Monthly Maintenance

Cost Accounting Level 2

Program Description - In this class, you learn strategies to complete advanced reclassification and overhead allocation. Additionally, you review the calculations behind RCC and RVU. Following successful certification in this class, the expectation is that you are able to handle advanced reclassifications and troubleshooting tasks.

Program Level – Advanced

Instructional Delivery Method – Group Live

Prerequisites

- See graphic below.
 - If you have been through a StrataJazz® implementation in the last 2 years or have been using the system regularly for 1-2 years, you do not need to take the below system prerequisites (Platform Features and Ad Hoc Reporter), but if you're new to the system, please follow the recommended StrataJazz® learning path.
 - Cost Accounting Level 1 is a prerequisite to taking Cost Accounting Level 2.

Advanced Preparation – None

Topics in Order:

- Complete Reclassifications and Overhead Allocations
- Deep Dive into Charge Allocation Methods
- Time-Driven Costing
- Creating Activity Codes
- Allocation Manager

Recommended StrataJazz® Learning Path:



Contract Analytics

This section provides an overview of the Contracts class offered along with the recommended training path for a new administrator.

Contract Analytics

Program Description - In this class, you learn the functionality and basic procedures for the Contract Analytics module. Following successful certification in this class, the expectation is that you are able to handle essential build, maintenance, and troubleshooting tasks.

Program Level – Intermediate

Instructional Delivery Method – Group Live

Prerequisites

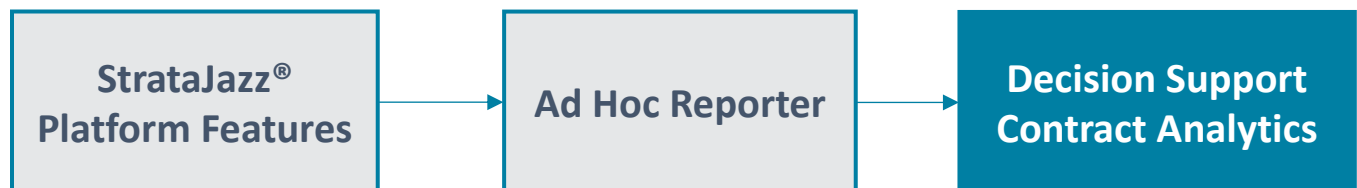
- See graphic below.
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Advanced Preparation - None

Topics in Order:

- Overview of Contract Analytics
- Rule Building
- Building Rule Sets for Contracts
- Data Flow
- Standard Reports
- Auditing Contracts
- Creating New Contracts
- Troubleshooting

Recommended StrataJazz® Learning Path:





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