

**STRATAJAZZ® TRAINING**

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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 offer our classes via live, online classes. With 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. Below are key benefits of obtaining certification:

- Provide practical skills, processes, and tools for optimal ability to administer the system
- Offer real-life training examples that are applicable to a system administrator's day-to-day tasks
- Provide a small classroom training environment with experienced Strata staff members
- A comprehensive training manual will be provided as part of the class, which can be used as an invaluable resource for reference year-to-year to prepare for new financial processing cycles and changing system setup needs
- Comprehensive overview for new team members or those affected by role changes

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 frequently asked questions and the content covered in each course.

Solution	Class
Cross-Solution	(Retired) Ad Hoc Reporter – DS
	Ad Hoc Reporter – FP
Advanced Planning	Capital Planning
	(Retired) Management Reporting
	Performance Management (includes Management Reporting and Productivity Reporting)
	OnePlan Budgeting
	Strategic Planning: Rolling Forecasting
Decision Support	Decision Support Analytics
	Cost Accounting
	Contract Analytics

## Class Registration FAQs

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### How do I enroll in a certification?

Complete the steps in the [Certification Sign Up Guide](#) to enroll in a certification:

For more information regarding administrative policies such as complaints and refunds, please contact [StrataAcademy@stratadecision.com](mailto:StrataAcademy@stratadecision.com).

### How much does a certification class cost?

Certification prices are priced on a per person per day basis. Even if a course is not a full day's length, the price is rounded up to the next full day.

Current pricing is below:

Training Location	Price
Virtual	\$375/person/day

As of June 3<sup>rd</sup>, 2024, below is the list of price offering per class.

Solution	Course	Virtual
Cross-Solution	Ad Hoc Reporter	\$375
Advanced Planning	Capital Planning Fundamentals	\$375
	Performance Management Fundamentals (includes both Management Reporting and Productivity Reporting)	\$560
	OnePlan™ Budgeting Fundamentals	\$375
	Strategic Planning – Rolling Forecasting Fundamentals	\$560
Decision Support	Decision Support Analytics	\$375
	Cost Accounting Fundamentals	\$375
	Contract Analytics Fundamentals	\$375

### When does registration close?

Class registration closes one week prior to the date of the course. This is to ensure each participant has a database for the course in order to practice the training scenarios.

### Do I need to complete any prerequisites before the class?

It is recommended to take the Introduction to StrataJazz eLearning course in Strata Academy before taking any other certification course. Any additional pre-requisites will be specified in the curriculum for the certification.

### What course should I take if I am brand-new to StrataJazz®?

Introduction to StrataJazz is a great introduction to the StrataJazz® system. In this eLearning course in Strata Academy, you will learn a brief overview of the homepage, security, and basic system configurations.

## Class Frequency FAQs

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### What if I can't make the class posted, when is it offered again?

You can expect an offering of each class in the cadence listed below:

Solution	Course	Cadence
Cross-Solution	Ad Hoc Reporter – Financial Planning	4x a year
Advanced Planning	Capital Planning Fundamentals	4x a year
	Performance Management Fundamentals	Every 8 weeks
	OnePlan™ Budgeting Fundamentals	Every 6 weeks
	Strategic Planning - Rolling Forecasting Fundamentals	4x a year
Decision Support	Decision Support Analytics	Every 8 weeks
	Cost Accounting Fundamentals	Every 6 weeks

	Contract Analytics Fundamentals	Every 12 weeks
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## When are the next quarter classes posted on the StrataJazz® Administrator Certification website?

The upcoming quarter's class schedule is posted on the following days below:

Quarter	Post Date
Q1 (January, February, March)	Courses are posted the third Tuesday of November.
Q2 (April, May, June)	Courses are posted the third Tuesday of February.
Q3 (July, August, September)	Courses are posted the third Tuesday of May.
Q4 (October, November, December)	Courses are posted the third Tuesday of August.

## Class Attendance FAQs

### Is class attendance mandatory?

Attendance in certification classes is not required to get certified, however, if obtaining CPE credits, attendance in certification class is mandatory for the entire class.

### What is the cancellation policy?

Cancellation and full refund requests can only be honored until one week prior to the training. The request must be received via email to [StrataAcademy@stratadecision.com](mailto:StrataAcademy@stratadecision.com). After that date, registration fees are forfeited.

If you cannot attend, you may designate a substitute attendee from your organization. Requests for substitutions may be made no later than three business days prior to the training. For further information, please contact the Strata Decision Training team at [StrataAcademy@stratadecision.com](mailto:StrataAcademy@stratadecision.com).

Additionally, please keep in mind that we reserve the right to cancel scheduled classes due to low enrollment or attendance. You will be notified if class is cancelled once registration closes and offered a future class date.

## Certification Assessment FAQs

### Do I need to take the certification class before I take the certification assessment?

The class and assessment (which includes a project and test) are part of a curriculum. Taking the class is the first step, and then you can take the assessment.

### What is the certification assessment?

The assessment consists of a test and project.

- Projects will be graded and scores will be communicated within two weeks of submission. A score of 75% or higher is required. A maximum of three attempts is allowed.
- Tests must be completed by the individual in Strata Academy. A score of 75% or higher is required. A maximum of three attempts is allowed.
  - You may not take screenshots of the questions or work with others while taking the test or project. Your certification will be voided if discovered to be cheating.

### What happens if I fail the test or project?

You have to pass both the test and the project to get certified.

After 3 failed attempts of the same test or project, you must re-attend the corresponding certification class before additional attempts are allowed. This also applies to those who took the assessment only who have not previously attended class.

- If you previously attended this certification class and paid for it or used anniversary days, then there is no charge.
- If you paid the \$100 for the assessment only, the cost to attend will be the difference in price between the assessment (\$100) and the class.
- A person must review all available eLearning for the course and wait at least two months from initial assessment enrollment to attend class again.
- After 6 failed attempts of the same exam, the trainee must re-attend the corresponding class before additionally attempts are allowed. Re-attendance after 6 fails is charged at the regularly rate. Attendees are able to use anniversary dates, if applicable.

Email [StrataAcademy@stratadecision.com](mailto:StrataAcademy@stratadecision.com) if you wish to proceed with the above process.

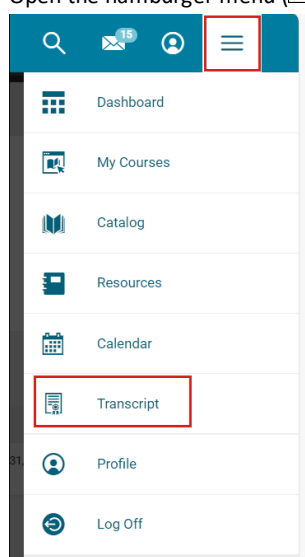
## How long is my certification valid?

Your certification will be valid until the end of the next calendar year. For example, certifications obtained in 2024 will be valid until the end of 2025. Certified individuals are responsible for completing and passing the annual renewal quiz in order to maintain certification. If an individual does not take the quiz during the time allotted, the certification will lapse. You will be notified via email when your certification(s) are due for annual renewal.

## How can I obtain my certificate?

You can view and print your certificate from your Strata Academy transcript.

1. Open the hamburger menu (☰) in the upper right corner of Strata Academy to view your **Transcript**.




2. Your certificate(s) will be listed at the top of your transcript. Click **Download** to download a PDF of the selected certificate.

TRANSCRIPT FOR

Print Transcript

Certificates

Courses



Username:

Email Address:

Department:

Credits: 0

Certificates

Course Title

Valid From

Expires

View

Ad Hoc Reporter Fundamentals Certification Assessment

January 16, 2024  
2:40 PM

December 31, 2025  
12:00 AM

Download

🕒

Certificate is expired

## Cross-Solution Certification Courses

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### 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.

#### 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.

#### RETIRED - Ad Hoc Reporter (Decision Support)

The Decision Support version of this class has been retired as Decision Support customers are encouraged to transition to our new Integrated Analytics and Reporting suite of tools. If you are interested in learning about Ad Hoc Reporter, refer to the Ad Hoc Reporter eLearning course in Strata Academy. Alternatively, you can attend the Ad Hoc Reporter for Financial Planning class as the content is still applicable to those using Ad Hoc Reporter for DS and contains optional, DS-specific exercises.

**Program Level** – Basic

**Instructional Delivery Method** – Group Live

**Prerequisites** – General Platform Features\*

#### Learning Objectives:

- Plan out a new report
- Select the right data source for an ad hoc report
- Create a basic ad hoc report
- Add advanced report functionality, including sections and calculations
- Distribute reports to others at your organization
- Create data visualizations, including charts and dashboards

#### Topics in Order:

- Introduction
- Build a Basic Ad Hoc Report
- Complete Advanced Report Configuration
- Manage Report Security and Distribute Reports
- Build Reports to Roll Over Automatically
- Create Data Visualizations

## Advanced Planning Certification Courses

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### Capital Planning

This section provides an overview of the Capital Planning class.

#### 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** – None

#### Learning Objectives:

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

#### Topics in Order:

- Introduction
- Capital & Business Planning Overview
- End User Workflows
- Capital Planning Workflow
- Manage Role Assignments
- Change Management
- Funding Releases
- Requisitioning
- Data Flow and Management
- Optimize Your Capital System



## Performance Management

This section provides an overview of the Performance Management class.

### Performance Management – Fundamentals

**Program Description** - In this class, you learn all the tools and processes you need to maintain and roll over the Management Reporting and Productivity Reporting modules. In addition, you will learn to confidently support other users of the module and troubleshoot common issues. Upon completion of all certification steps, attendees are certified in both the Management Reporting and Productivity Reporting modules.

**Program Level** – Intermediate

**Instructional Delivery Method** – Group Live

**Prerequisites** – None

#### Learning Objectives:

- Navigate the Management Reporting Scorecards
- Enter Commentary on Monthly Metrics
- Update Role Assignments in Security Center
- Configure and Maintain Dimensions
- Update and Maintain settings in System Center
- Navigate the Productivity Reporting summary page
- Enter Commentary on Pay Period Metrics
- Access Commonly used Reports
- Complete Prerequisites for Productivity Reporting

#### Topics in Order:

- Management Reporting Solution Review
- Role Assignments
- Data Flow & Sampling
- System Center
- Integration with Other Modules
- Monthly Maintenance Steps and Rollovers
- Productivity Reporting Solution Review
- Managing the Bi-weekly Process
- Roll Over
- Troubleshooting

## OnePlan Budgeting

This section provides an overview of the OnePlan Budgeting class.

### OnePlan Budgeting Fundamentals

**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** – Basic

**Instructional Delivery Method** – Group Live

**Prerequisites** - 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
  - Budgeting Overview & OnePlan Platforms
  - Budgeting Key Terms
- Administrator Training
  - Plan Configuration
  - Plan Editor
- End User Training: My Budgets
  - My Budgets Overview
  - Department Budget Walk-Through
- Finalize the Budget

## Strategic Planning – Rolling Forecasting

This section provides an overview of the Strategic Planning classes offered.

### Strategic Planning – Rolling Forecasting Fundamentals

**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 use Data Studio to push out mass assumptions and learn how to push new data to your models.

**Program Level** – Intermediate

**Instructional Delivery Method** – Group Live

**Prerequisites** - None

#### Learning Objectives:

- Navigate and customize the Strategic Planning grid
- Complete a Rolling Forecast
- Manage access to Strategic Planning
- Push out global assumptions across models using Data Studio
- Understand and manage the Strategic Planning data flow
- Troubleshoot common issues

#### Topics in Order:

- Navigating Strategic Planning
- Rolling Forecasting Model Deep Dive
- Manage Access to Strategic Planning
- Update Models Using Data Studio
- Data Flow in Strategic Planning
- Troubleshooting

## Decision Support Certification Courses

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### Decision Support Analytics

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

#### Decision Support 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** - 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

## 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 Fundamentals

**Program Description** - In this introductory class, you learn what Cost Accounting is and the basic processes and configuration steps 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 fundamental build, maintenance, and troubleshooting tasks.

**Program Level** – Intermediate

**Instructional Delivery Method** – Group Internet Based

Participants will earn 5.0 CPE credits.

**Fields of Study:**

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

**Prerequisites** - None

**Learning Objectives:**

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

**Topics in Order:**

- Cost Accounting Overview
- Preparing Historical Data
  - Maintaining Dimensions
  - Updating Datasets for Costing
- Creating & Configuring a New Cost Model
  - Department Exceptions
  - Configuring Cost Components
  - Defining Variability
  - Configuring Statistic Drivers & Importing Manual Statistics
  - Reclassifying Accounts, Payroll, and Departments
  - Overhead Allocation
  - Configuring Cost Allocation
- Run Costing
- Auditing and Publishing the Cost Model
- Maintaining the Cost Model

## Contract Analytics

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

### Contract Analytics Fundamentals

**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** - None

#### Learning Objectives:

- Navigate the Contract Analytics solution.
- Understand Billing Summary Modeling.
- View and edit a contract term rule set.
- Manage alerts and notifications.
- Validate current year contract models.

#### Topics in Order:

- Overview of Contract Analytics
- Contracts and Sections
- Building Rulesets
- Rule Building
- Data Flow
- Managing Alerts
- Auditing Contracts
- Troubleshooting

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