Advanced Healthcare Financial Reporting and Business Partnering Course

16 – 20 November 2026
San Diego

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Training Center

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Ref: 1455_207410 **Date:** 16 – 20 November 2026 **Location:** San Diego **Fees:** 14000 Euro

Overview

Advanced Healthcare Financial Reporting and Business Partnering Course is a one-week applied programme for healthcare finance professionals, management accountants, analysts, budget owners, service managers, and operational leaders. Participants build a Healthcare Finance Reporting and Partnering Portfolio connecting reliable accounting information, period-end control, management reporting, healthcare management accounting, budget and forecast support, healthcare budget variance analysis, service-line insight, decision support, and constructive finance partnering. Agile Leaders Training Center helps participants turn financial and operational evidence into clear management conversations without providing tax, audit, investment, or jurisdiction-specific accounting advice.

Who Should Attend

- Healthcare finance managers, accountants, and management accountants
- Financial planning, reporting, budgeting, and analysis professionals
- Finance business partners and service-line analysts
- Clinical, operational, and administrative managers with budget responsibility
- Performance, costing, productivity, and decision-support teams

The course assumes practical experience with healthcare finance, reporting, budgeting, operations, or service management. It supports organizational decision processes and does not replace professional accounting standards, statutory reporting requirements, independent assurance, or authorized financial advice.

Departments and Industries

The course supports organizations seeking stronger healthcare financial reporting, accountable resource use, and evidence-led collaboration between finance and service teams.

- Hospitals and integrated healthcare systems
- Primary, community, ambulatory, and specialist care providers
- Public health and healthcare commissioning organizations
- Finance, planning, operations, quality, and clinical services
- Healthcare support, shared-service, and advisory functions

Learning Objectives

By the end of this course, participants will be able to:

- Map healthcare accounting information from source activity to management reporting
- Strengthen period-end reliability through cut-off, reconciliation, estimate, and review controls
- Build management packs that connect financial and operational performance
- Conduct healthcare budget variance analysis across volume, price, mix, workforce, and cost drivers
- Develop healthcare service line finance insight using consistent cost and activity definitions
- Prepare forecasts, scenarios, option appraisals, and decision-support briefs
- Practise healthcare finance business partnering with constructive challenge and accountable follow-up

Course Agenda

Day 1: Accounting Information and Period-End Reliability

- Healthcare Finance Information Flow Map
- Chart of Accounts and Service Coding Review
- Accrual, Cut-Off, Estimate, and Reconciliation Checklist
- Period-End Close Calendar and Responsibility Matrix
- Financial Control Evidence File

Day 2: Financial and Management Reporting

- Financial Statement and Management Pack Bridge
- Reporting Definition and Data-Quality Check
- Actual, Budget, Forecast, and Prior-Period View
- Narrative Commentary and Variance Explanation
- Reporting Review and Sign-Off Protocol

Day 3: Cost, Budget, and Service-Line Insight

- Cost Driver and Allocation Map
- Healthcare Service Line Finance View
- Budget Assumption and Ownership Register
- Volume, Price, Mix, Workforce, and Cost Variance Analysis
- Productivity, Capacity, and Financial Insight

Day 4: Forecasting, Controls, and Decision Support

- Rolling Forecast and Scenario Framework
- Internal Control and Exception Review
- Risk, Opportunity, and Sensitivity Register
- Option Appraisal and Decision-Support Brief
- Action, Owner, Benefit, and Follow-Up Tracker

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Day 5: Finance Business Partnering Practice

- Exercise: Lead a Period-End Performance Review
- Exercise: Challenge a Budget and Forecast Constructively
- Exercise: Translate Cost and Activity Data into Service Insight
- Exercise: Facilitate a Finance and Operations Decision
- Capstone: Healthcare Finance Reporting and Partnering Portfolio

Practical Exercises

The course uses organizational scenarios from hospitals, ambulatory services, community care, shared services, and multi-service healthcare providers.

- Suggested activity: reconcile a period-end exception and document the control evidence.
- Suggested activity: prepare a healthcare financial reporting course management pack with concise commentary.
- Suggested activity: investigate budget and service-line variances using activity and cost drivers.
- Suggested activity: facilitate a finance partnering meeting and produce a decision-support brief with owners and follow-up.

FAQs

Who should attend a healthcare financial reporting course?

It suits healthcare accountants, finance managers, analysts, budget and planning professionals, finance business partners, service managers, and operational leaders who use financial information to support performance and decisions.

What is healthcare management accounting in this course?

It is the disciplined use of cost, activity, budget, forecast, productivity, and operational information for internal planning, control, performance conversations, and decisions. The course keeps this work separate from statutory advice and external assurance.

How does healthcare finance business partnering differ from routine reporting?

Routine reporting explains results. Business partnering adds context, questions assumptions, connects financial and operational evidence, explores options, supports decisions, and follows agreed actions with service and clinical leaders.

What does healthcare budget variance analysis cover?

Participants structure analysis around volume, price, mix, workforce, timing, activity, allocation, and other relevant cost drivers, then distinguish explanation from controllable action, forecast effect, and management ownership.

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What practical outputs will participants complete?

Outputs include an information-flow map, close checklist, control file, management pack, service-line view, variance analysis, forecast framework, option appraisal, decision-support brief, and partnering action tracker.