



Optimal Medical Therapy in Heart Failure (OMT-HF) Certificate Program

PARTICIPANT MANUAL

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Introduction

Welcome!

The Heart Failure Society of America (HFSA) is a multidisciplinary organization working to improve and expand heart failure care through collaboration, education, research, innovation, and advocacy. HFSA members include physicians, scientists, nurses, nurse practitioners, pharmacists, and patients.

The vision of the HFSA is to significantly reduce the burden of heart failure while the mission is to provide a platform to improve and expand heart failure care through collaboration, education, innovation, research, and advocacy.

HFSA provides professionals with opportunities to develop their career through fellowship, educational programs, in-person connections, mentorship, and leadership volunteering.

Rationale and Overview

Although several classes of medication have been shown in randomized clinical trials to improve outcomes in heart failure, many patients do not receive these medications, or receive them at lower than optimal doses. This program focuses on Optimized Medical Therapy (OMT) for heart failure, which can be understood as optimal utilization and dosing of these evidence-based treatments. Our focus in this program is heart failure with reduced ejection fraction (HFrEF); however, heart failure with preserved ejection fraction (HFpEF) is also discussed.

To build your knowledge of OMT for heart failure, this program includes the following components:

- Introduction to the Program and OMT
- Module 1: Available Medical Therapy for Heart Failure
- Module 2: Managing OMT to Target Doses
- Module 3: Management Across the Care Continuum

The entire 3-module eLearning-based course and a final assessment, must be completed to earn the certificate. Important additional details follow. A full Program Outline of the course modules and learning objectives is contained at the end of this manual.

INTRODUCTION

Program Goals

After completing this program, you will have a current understanding of evidence-based therapies for HF, limitations and challenges in their utilization, and principles for up-titration to target or best-tolerated doses.

The Optimal Medical Therapy in Heart Failure Certificate Program (OMT-HF) gives healthcare providers who do not specialize in heart failure the opportunity to learn about therapies, dosing, and prescription optimization to better manage their patients with heart failure.

The HFSA OMT-HF Program provides comprehensive education in three key domains of knowledge:

- Medical therapy for heart failure
- Optimizing medical therapy for heart failure
- Heart failure management across the care continuum

Target Audience

The HFSA OMT Assessment-Based Certificate Program was developed for non-HF specialist healthcare providers who prescribe and routinely manage HF medications. This includes healthcare providers (with prescribing privileges, such as physicians, APP, PharmD) who manage patients with heart failure:

- Physicians (general cardiologists, hospitalists, and family practice physicians/internists who treat patients with heart failure but are not heart failure specialists)

- Nurse practitioners (NPs) who manage patients with HF
- Physician assistants (PAs) who manage patients with HF
- Non-prescribing healthcare professionals who are involved in medical management of heart failure, including:
 - Clinical pharmacists
 - Nurses
 - Case managers

The target audience was identified, analyzed, and selected during a formal needs analysis process conducted by HFSA, in consultation with subject-matter experts in heart failure, in 2020.

Final Assessment

The Certificate program assessment consists of 61 multiple-choice and multiple-response questions. Question order and responses are randomized. A team of subject-matter experts developed the final assessment questions to test your achievement of the learning objectives listed at the beginning of each lesson in the program. The subject-matter experts also set the passing score, following best practices and principles of testing methodologies.

Program Development

Educational Content Development

Educational content development and maintenance are directed by HFSA's Optimal Medical Therapy (OMT) Committee, which is populated with subject-matter experts and clinicians in heart failure. The subject-matter experts of the OMT closely guided content development from the needs analysis through the launch of the OMT-HF Certificate Program at the outset. The OMT Committee also oversees and guides ongoing reviews and substantive educational content updates (as well as assessment updates).

The OMT Committee works in collaboration with the HFSA internal team with guidance by an instructional design team to ensure that content is developed, updates are cascaded across all program components in an instructionally sound and consistent manner, and that revisions are executed within the established framework of the program.

All educational content is reviewed at least once annually by the OMT Committee for accuracy, relevance, and to assess if updates are required.

Assessment Development

The OMT-HF program is an Assessment-based Certificate Program that has one final summative assessment to test the attainment of the intended learning outcomes identified through the needs analysis and educational content development processes.

The HFSA internal team worked with an instructional design content development team and the OMT Committee to develop the inaugural final summative assessment for the program. Assessment items for the certificate-awarding assessment follow an established curriculum which is developed in consultation with a committee of subject-matter experts (the OMT Committee).

HFSA engages a psychometric team with expertise in Standard Setting for accredited Certificate programs to guide the establishment of the passing score. The purpose of using a psychometrically-sound process to establish the passing standard is to yield reliable outcomes. The methodology used throughout this process is well-recognized and accepted for criterion-referenced credentialing programs.

Annually, a statistical analysis of the results for each assessment item (i.e., question) is performed. Items that perform poorly or are answered incorrectly by a substantial portion of learners are flagged for review by the OMT Committee. This process may be followed more frequently if the content requires an update or if an item is brought to the attention of the OMT Committee, by a learner for example, or if members of the Committee become aware of a necessary update to the content. During this annual review, appropriate stakeholders review the exam form for relevancy and

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integrity. During this review, the OMT Committee, with assistance from the HFSA internal team and instructional design/psychometric teams, confirm that the exam aligns with the educational content, and revisions are executed appropriately and as necessary.

The OMT Committee reviews all flagged items. If the OMT Committee determines that an item is defective, the item will be assessed for corrective action, which may include revising or replacing the item.

If revisions to the assessment are required, the OMT Committee, HFSA internal review teams, and support team (e.g., instructional design and psychometric teams) assess if content revisions are necessary due to a revision to content, the item analysis, or both. If changes are required, revisions are executed and verified by the OMT Committee and HFSA internal review teams, with guidance by the instructional design and psychometrics team.

What You Need to Know as a Program Participant

Program Structure and Assessment

The program consists of one (1) eLearning-based course divided into three (3) modules and one (1) final summative assessment. You must complete the educational course and pass the final assessment to earn the certificate.

Specifically, you must pass the final certificate-awarding summative assessment with a score of 70% or higher in order to earn the certificate. There are 61 questions on the final exam. This is a timed, 2-hour, closed-book test, with no option for going back into the course once the test has been started. Two retakes are permitted, with a minimum of 14 days between retakes required.

The time allotted for completion of the Certificate Program is 90 days, including the final assessment.

Prerequisites and Enrollment Requirements

Program requirements for earning the OMT-HF Certificate are limited to the completion of educational content within the course (including 3 modules) and passing the final summative assessment. With the assistance of subject-matter experts (SMEs), HSFA's Optimal Medical Therapy Committee established these requirements for the purpose of ensuring that those who completed the program have demonstrated the knowledge

necessary to work safely and effectively with patients in optimizing medical therapy for heart failure.

Certificate Information

The HFSA OMT Committee has the sole authority to issue an OMT-HF Certificate only to those healthcare providers who: (1) have completed the educational content of the course, including the three modules contained within it (2) have passed the final summative assessment; and (3) have complied with, and continue to comply with, the policies of the OMT-HF Program. No factors other than the above three (3) will be taken into consideration by the OMT Committee in making decisions about awarding and/or revoking the OMT-HF Certificate.

The HFSA maintains sole ownership of the OMT-HF certificates issued to completers of the Program. The HFSA shall have enforceable arrangements with the health professionals who have been awarded the OMT-HF certificate to ensure that, in the event of revocation of the Certificate, the OMT-HF certificate must be returned to the HFSA OMT Committee, Manager of eLearning, and Manager of Education and Meetings. Also, the healthcare professional who has had their OMT-HF certificate revoked must refrain from stating that they have been awarded the OMT-HF certificate.

Certificate vs. Certification

The OMT-HF is an assessment-based *certificate* program, not a professional *certification* program. As a recipient of the Assessment-Based Certificate in optimizing medical therapy for heart failure, you

WHAT YOU NEED TO KNOW AS A PROGRAM PARTICIPANT

cannot claim that the OMT-HF program is a professional certification, and you are not allowed to use any initialisms in reference to the OMT-HF Certificate Program after your name.

Recipients of the OMT-HF certificate who are proven to have disregarded this policy will have their certificate revoked and must return the certificate to the Manager of eLearning and Manager of Education and Meetings, and will have their names removed from the roster of Certificate holders (note the roster is not publicly available; a verification process is in place for Certificate holders, as described herein, see *Certificate Verification*).

As a certificate holder, you are allowed to:

- State that you hold or have earned the HFSA Assessment-based Certificate in Optimal Medical Therapy for Heart Failure (OMT-HF).
- Appropriately indicate your Certificate status in your email signatures, Linked In page, website, marketing collateral, and social media channels.

As a certificate holder, you are NOT allowed to:

- State that you are Certified in OMT-HF or that you are a Certified Optimized Medical Therapy for Heart Failure Practitioner.
- Use any acronyms or letters after your name that reference the OMT-HF Certificate or to make improper inferences of the OMT-HF designation and logo.

Certificate Verification

The names of completers of the OMT-HF Certificate program are maintained and on file at the HFSA but are not publicly available on the HFSA website. Our privacy policy dictates that assessment results and other personal information from an HFSA OMT-HF completer's file is not disclosed to a third party without prior written permission from the certificate holder. However, if HFSA is contacted by a corporation, healthcare institution, individual, state licensing board, or other appropriate stakeholder regarding your status as an OMT-HF Certificate holder, HFSA staff will confirm if the Certificate is valid.

Certificate verification requests are handled by HFSA staff and responded to as soon as possible (typically within one business day). This allows employers, prospective employers, health professionals, patients, and individuals from other communities of interests to verify whether a health professional has completed and holds the OMT-HF Certificate while protecting your privacy.

Appeals Regarding Assessment Results

Participants who fail the assessment and believe that a scoring error may have occurred may request that their exam be rescored. This request must be made in writing (email is acceptable) to a member of the HFSA staff.

Assessment Records

HFSA maintains an internal database of certificate holders based on record documentation received from participants at the time of

WHAT YOU NEED TO KNOW AS A PROGRAM PARTICIPANT

registration and from their assessment activity in the learning management system. All assessment scores and records are maintained in the learning management system.

How to Access HFSA Educational Content

The assessment is administered online via HFSA's learning management system (Learning Center), which is the same system you will use to access the educational content of the program. You must have completed all of the educational content in the course in order to log in and take the final assessment. You are required to log in to the LMS with your own unique ID and password. Once you log in to take the assessment, you will be asked to read and agree to an honor code verifying your identity. You must also agree to take the assessment without assistance from anyone else, without consulting resource materials, and without providing assistance to anyone else.

As a first step, login to the HFSA Learning Center to select and purchase the OMT-HF Certificate Program.

Once you purchase the program, you will see the agreement page with the honor code to accept. Upon acknowledgment and confirmation, the 90-day access period starts, and you will be brought to a page with a link to the course. All three modules of the program are contained within the course.

Once you have completed the educational content, you will be allowed to take the final assessment. Once the final exam is finished, the course will be considered completed, though you can refer to

the material as needed during the 90-day course window (except when you are taking the final assessment, at which time the eLearning content is inaccessible).

Upon exam submission, you will immediately receive your score in the Learning Center. Those who achieve a minimum passing score of 70% or higher (at least 42 out of 61 items correct) are awarded the Certificate. Those who do not pass will be allowed up to two retakes. However, there is a 14-business day washout period after failing the exam before retake. Once this period has elapsed, you may begin your next attempt.

A post-evaluation will be available after you complete your last attempt of the OMT-HF Certificate Program assessment. Users who passed the exam can then download their certificate.

NOTE: If you experience technical or navigational difficulty with the course, call (301) 312-8635, 9:00-5:00 ET Monday-Friday. Alternatively, email OMT-HF@hfsa.org with your query. Responses are routinely handled within one business day.

Equal Opportunity and Accommodations

HFSA will provide reasonable and appropriate testing accommodations in accordance with the Americans with Disabilities Act (ADA) of 1990, as amended for individuals with documented disabilities who request and demonstrate the need for accommodation as required by law. ADA regulations define a person with a disability as someone with a physical or mental impairment that substantially limits one or more major life activities. HFSA requires documentation to validate the type and severity of a disability to enable accommodations to be specifically matched with the identified functional limitation, in order to provide equal access to exam functions for all examinees.

The information provided by students and any documentation regarding such disability and special accommodation, will be treated with strict confidentiality and will not be shared with any source, with the exception of HFSA, without the student's express written permission.

Reasonable accommodations are decided based upon:

- The individual's specific request
- The individual's specific disability
- Documentation submitted
- The appropriateness of the request

Reasonable accommodations do not include steps that fundamentally alter the purpose or nature of the examination. Reasonable accommodations generally are provided for students who:

- Have a physical or learning impairment that substantially limits that person in one or more major life activities (e.g., walking, talking, hearing, performing manual tasks)
- Have a record of such physical or learning impairment
- Have been documented as having a physical or learning impairment

Requests for accommodations are reviewed by the HFSA internal staff (typically the eLearning Manager or Manager of Meetings and Education) who works to ensure appropriate arrangements for all approved requests and to ensure the request can be processed without jeopardizing the integrity or security of the assessments. Special accommodations must be requested in advance by indicating the need for a special testing accommodation and submitting the request to HFSA in email form.

HFSA communicates with the student to accommodate their needs accordingly.

If you require an accommodation to access the educational content of the course or the Certificate assessment, please contact HFSA at OMT-HF@hfsa.org with your request. Requests are handled on a case-by-case basis.

Disclosures and Data Security

Data breaches can often be attributed to the actions performed by an organization's employee(s), whether they are intentional or unintentional. All persons with physical and logical access to the Learning Center, whether employees, third-parties, service providers, contractors, temporary employees, and/or other staff members, must be trained on their role in protecting the platform from threats to help safeguard private information.

Private information (including but not limited to the above) shall not be disclosed to a third party except as necessary for ethical or legal investigations, such as violations of Certificate program policies as described herein or allegations of criminal activity.

Security of Data

While we strive to use reasonable means to protect your Personal Data, we cannot guarantee its absolute security. HFSA takes reasonable steps to ensure that your data is treated securely and in accordance with our Privacy Notice (<https://hfsa.org/site-terms-and-conditions>).

Data Breach Policy

Once a data breach is discovered, the HFSA staff will immediately implement the HFSA Data Breach Policy. The following are key points of the Data Breach Policy.

Unauthorized access to, unauthorized acquisition of, or accidental release of personal information that compromises the security,

confidentiality, or integrity of the personal information of enrollees or completers of HFSA Certificate programs (and other HFSA continuing education courses) constitutes a data breach.

Reasonable attempt shall be made to notify those whose personal information has been compromised or released without authorization. Concurrent to this action, steps shall be taken to restore data, reinforce security, and to return all systems to full operation as soon as possible.

Program Data and Records Retention

Documents are retained only so long as they are (1) necessary to the conduct of HFSA business; (2) required to be kept by statute or government regulation; or (3) relevant to pending or foreseeable investigations or litigation. Retention periods are based primarily on current federal record-keeping requirements and state statutes of limitation.

The organization's learner records are stored in a safe, secure, and accessible manner. Documents and financial files that are essential to keeping the organization operating in an emergency will be duplicated or backed up at least every week and maintained off-site.

All OMT-HF program records are maintained on a secure network that is accessed only by: (1) the eLearning Manager and (2) the Manager of Meetings and Education. Records are stored in a database maintained at Oasis LMS/360Factor. The network is password protected and secure.

OMT-HF Certificate Curriculum

The knowledge domains, intended learning outcomes, and outline of the educational content were identified, analyzed, and validated during a formal needs analysis in 2020, and are as follows.

Knowledge Domains	Learning Outcomes	Educational Content
Medical therapy for heart failure	Module 1: Available Medical Therapy for Heart Failure	
	<ul style="list-style-type: none"> • Explain how RAS inhibitors are used in the management of HFrEF • Explain how beta-blockers are used in the management of HFrEF • Explain how MRAs are used in the management of HFrEF • Explain how SGLT2Is are used in the management of HFrEF • Describe the role of the following therapies in the management of HFrEF: Isosorbide dinitrate + hydralazine, Ivabradine, and digoxin 	Lesson 1: Medications Used in the Management of HFrEF
	<ul style="list-style-type: none"> • Describe the overarching principles for managing HFpEF • Distinguish between ACC/AHA/AFSA Class I and Class II recommendations for managing HFpEF • Describe the rationale for managing heart failure with mildly reduced ejection fraction (HFmrEF) with agents approved for HFrEF 	Lesson 2: Approaches for Management of HFpEF
Managing OMT to Target Doses	Module 2: Managing OMT to Target Doses	
	<ul style="list-style-type: none"> • Identify the patient-related factors that may present barriers to OMT • Identify the clinician-related factors that may present barriers to OMT • Identify system-related factors that may present barriers to OMT 	Lesson 1: Barriers to Titration
	<ul style="list-style-type: none"> • Explain the goals and principles of OMT • Describe how renin-angiotensin-aldosterone system (RAS) inhibitors are initiated and titrated • Describe how beta-blockers are initiated and titrated 	Lesson 2: How to Manage and Titrate OMT Over Time

	<ul style="list-style-type: none"> Describe how mineralocorticoid receptor antagonists (MRAs) are initiated and titrated Describe how sodium-glucose cotransporter 2 (SGLT2) inhibitors are initiated and titrated 	
	<ul style="list-style-type: none"> Describe strategies for managing a patient with HFrEF who develops hypotension during treatment optimization Describe strategies for managing a patient with HFrEF who develops worsening renal function and hyperkalemia during treatment optimization Describe strategies for managing a patient with HFrEF who develops bradycardia during treatment optimization 	Lesson 3: Clinical Scenarios
Module 3: Management Across the Care Continuum		
Heart Failure Management Across the Care Continuum	<ul style="list-style-type: none"> Identify opportunities for optimization of medical therapy in the hospital setting Describe the challenges that may arise during transitions of care (TOC) 	Lesson 1: Optimization During Inpatient Care and TOC
	<ul style="list-style-type: none"> Describe the process of initial evaluation for patients newly diagnosed with HF Explain the process for initiating and titrating medications Describe how the patient may be reevaluated following stabilization 	Lesson 2: Optimization During Outpatient Care
	<ul style="list-style-type: none"> Identify the members of the multidisciplinary HF care team Describe strategies and structured programs to support OMT 	Lesson 3: Strategies and Programs to Support OMT