Oregon SBHC
School-Based Health Centers

Operational Profile Training

Thursday, August 3rd , 2017

Oregon Health Authority

Agenda

- ✓ SBHC Site Coordinator role
- ✓ Why, When & Where
- ✓ Operational Profile structure
- ✓ Staff – Who to include/Roles
- ✓ State Program Office (SPO) changes to Operational Profile
- ✓ Helpful Hints
- ✓ Audit Process
- ✓ Operational Profile User's Guide

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SBHC Site Coordinator role

- Manage Operational Profile
  - Oct 1st deadline
  - Update as changes occur throughout the year
- Fill required SBHC roles
- Attend Coordinators Meetings
  - October (In-person)
  - Winter (webinar)
  - Spring (webinar)
- Communicate with partners
  - LPHA, SBHC Staff, SPO, etc.
- Submit Encounter Data
  - Mid-year, year-end
- Submit Satisfaction Surveys
  - Mid-year, year-end

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Why have an Operational Profile?

1. It's **required for Certification**
2. It demonstrates that sites are in compliance with the Standards for Certification, Version 4 such as:
   - Staffing roles & shifts, hours of operation, identifying on-site vs. by referral services, Key Performance Measures & financial information
3. Enables SPO to answer questions from legislators or partners regarding information such as:
   - PCPCH Status, number of centers with Youth Advisory Councils, number of centers with Oral Health Providers, etc.

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When to fill out the profile

- After initial certification application approval: By date provided by SPO after initial certification application has been approved.(A.1.d.2)
- After certification – October 1st Deadline: Yearly renewal **no later than October 1** to remain certified (A.1.g)
- As changes occur throughout the year: Sites are required to keep their Operational Profile up to date
- Prior to a verification site visit

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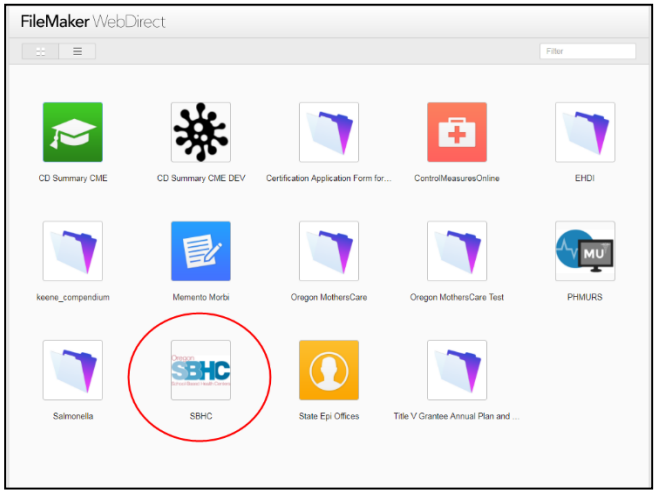
Where to get started

- Access the **NEW login** page by visiting:
  http://epiweb.oha.state.or.us/fmi/webd#
- Link can also be found on SPO website (Certification Standards page)
- Login information is issued by SPO to new sites and existing sites who have a new medical sponsor
- Login information does not change from year to year
- Feel free to contact us if you lose or forget your login information
  sbhc.program@dhsoha.state.or.us



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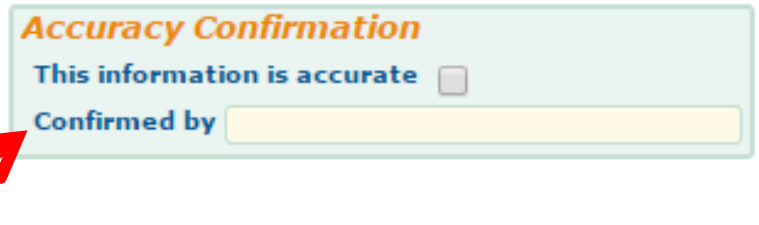
Operational Profile structure

- You must review and update the following tabs/pages:
  - Details
    - Including County, System and Medical Sponsor information
  - Operations
  - Staff
    - Individual Staff pages (Staff & Shift Hours)
  - Shift Hours
  - Services (NEW!)
  - KPMs
  - Financial



- Be sure to mark the accuracy confirmation boxes. If you don't we can only assume your Operational Profile is not done.

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Reminder:

- SBHC **details**, **operations**, **staff, shift hours and services** information should be for the current fiscal year (July 1, 2017 to June 30, 2018).

- **KPM** and **Financial data** should be from the previous fiscal year (July 1, 2016 to June 30, 2017).
  - NOTE: Brand new SBHCs that are certified on or after January 1 are not required to submit KPM or financial data for that fiscal year. SBHCs who undergo a transfer of medical sponsorship on or after January 1 are not required to submit KPM data for that fiscal year, but do need to submit financials for whatever portion of the year they sponsored the SBHC.

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Staff – Who to include

- Please include all staff that have clinical on-site shifts at the SBHC including:
  - Staff whose hours are not used to meet certification requirements
  - Staff whose data is not submitted to the SPO
    - I.e.: Support staff, community health workers, health educators, etc.
- Also include staff who do not have weekly on-site clinical shifts but have other roles associated with the SBHC
  - I.e.: Health Department Administrator, SBHC Administrator, monthly Oral Health Providers, etc.
  - Use the 'Comments' box on their individual Shift Hour page to list their role, physical work location and typical weekly shift schedule (days/hours).
    - I.e.: HD Administrator. Works Mon-Fri, 8am-5pm at the county health dept.

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Staff - Roles

- SBHCs are required to assign the following roles:
  - Health Department Administrator
  - Health Department Primary SBHC Contact
  - Immunization Coordinator
  - Laboratory Coordinator
  - Medical Director
  - Office/Health/Medical Assistant
  - Primary Care Provider
  - Privacy Official
  - Quality Assurance Coordinator
  - SBHC Administrator
  - SBHC Site Coordinator
- Some staff may hold multiple roles
- Additional roles are available and should be assigned to appropriately reflect the SBHC staffing model (i.e.: QMHP, Oral Health Provider, etc.).
- SBHC role descriptions can be found in the Certification Standards, Version 4 on the Certification Standards page of our website (www.healthoregon.org/sbhc).

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QUESTIONS???

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SPO Changes to Operational Profile

The whole site has a new look!

We have added the following 'tab':

- Services

We have made changes to the following 'tabs':

- Operations
- Individual Staff & Shift Hours
- Waiver
- Annual Revenue Detail

We have not made changes to the following 'tabs':

- Details
- Staff
- Shift Hours
- KPM
- Financial

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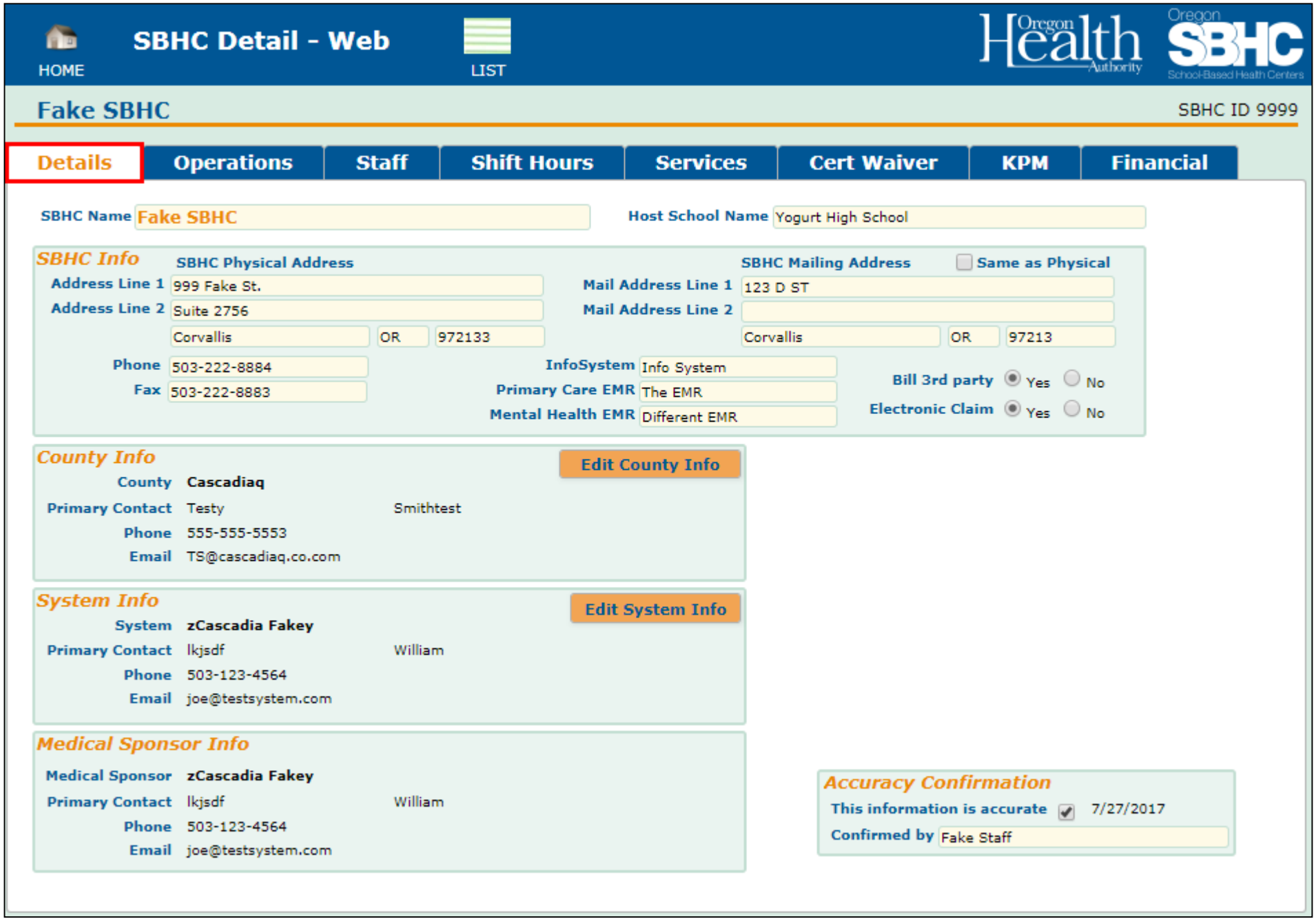
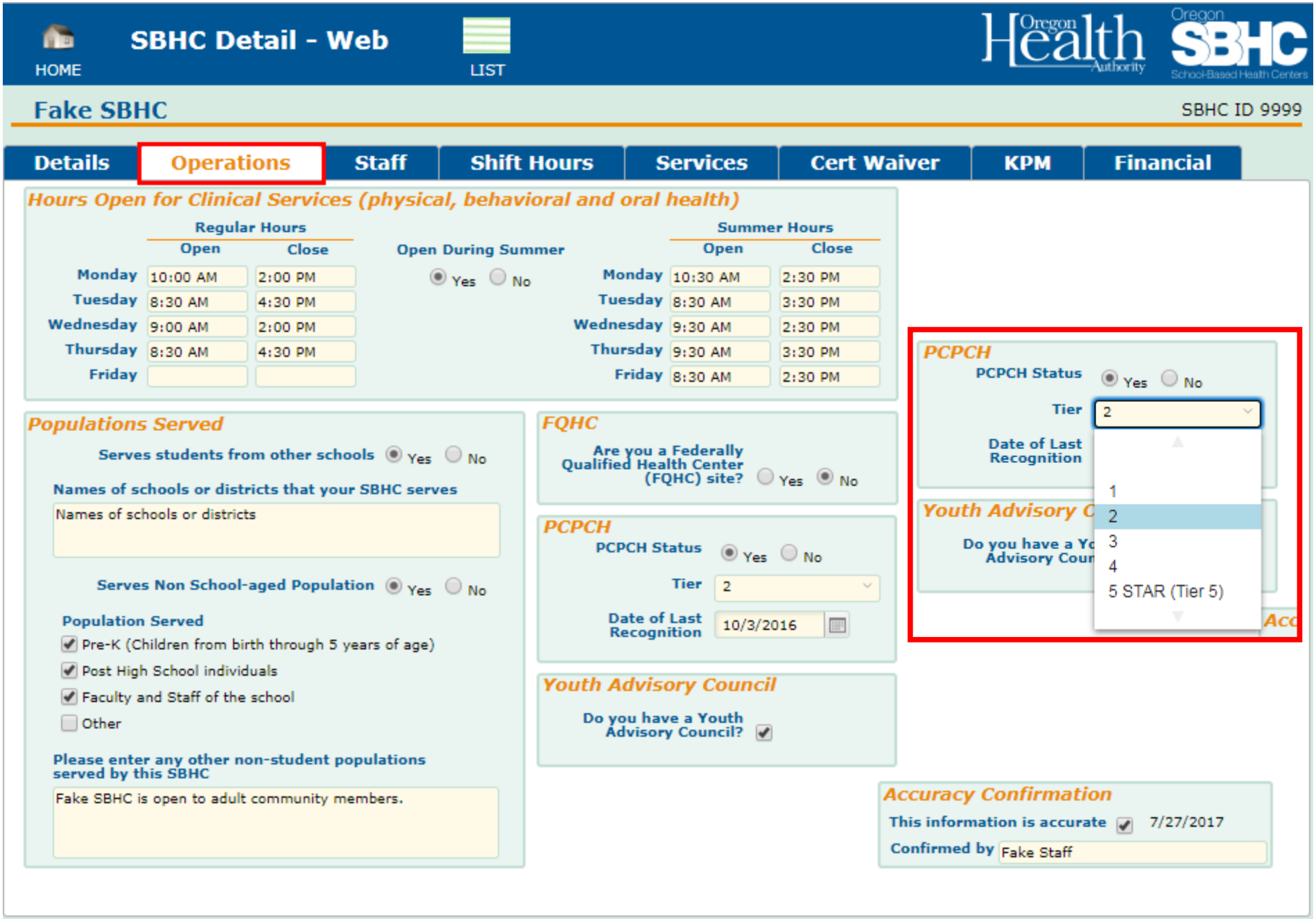
Details ‘tab’ – no changes

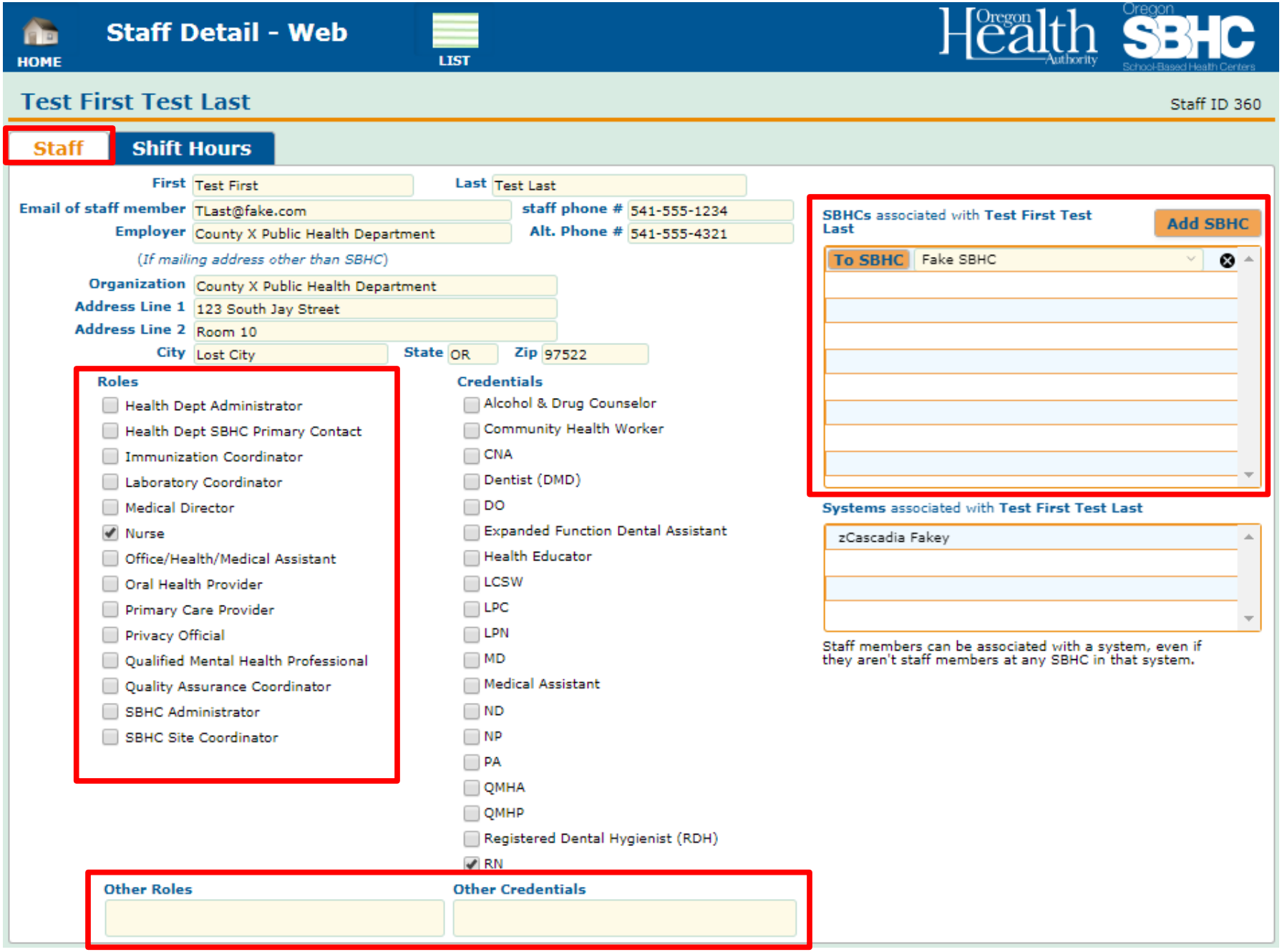


Changes to Operations 'tab'

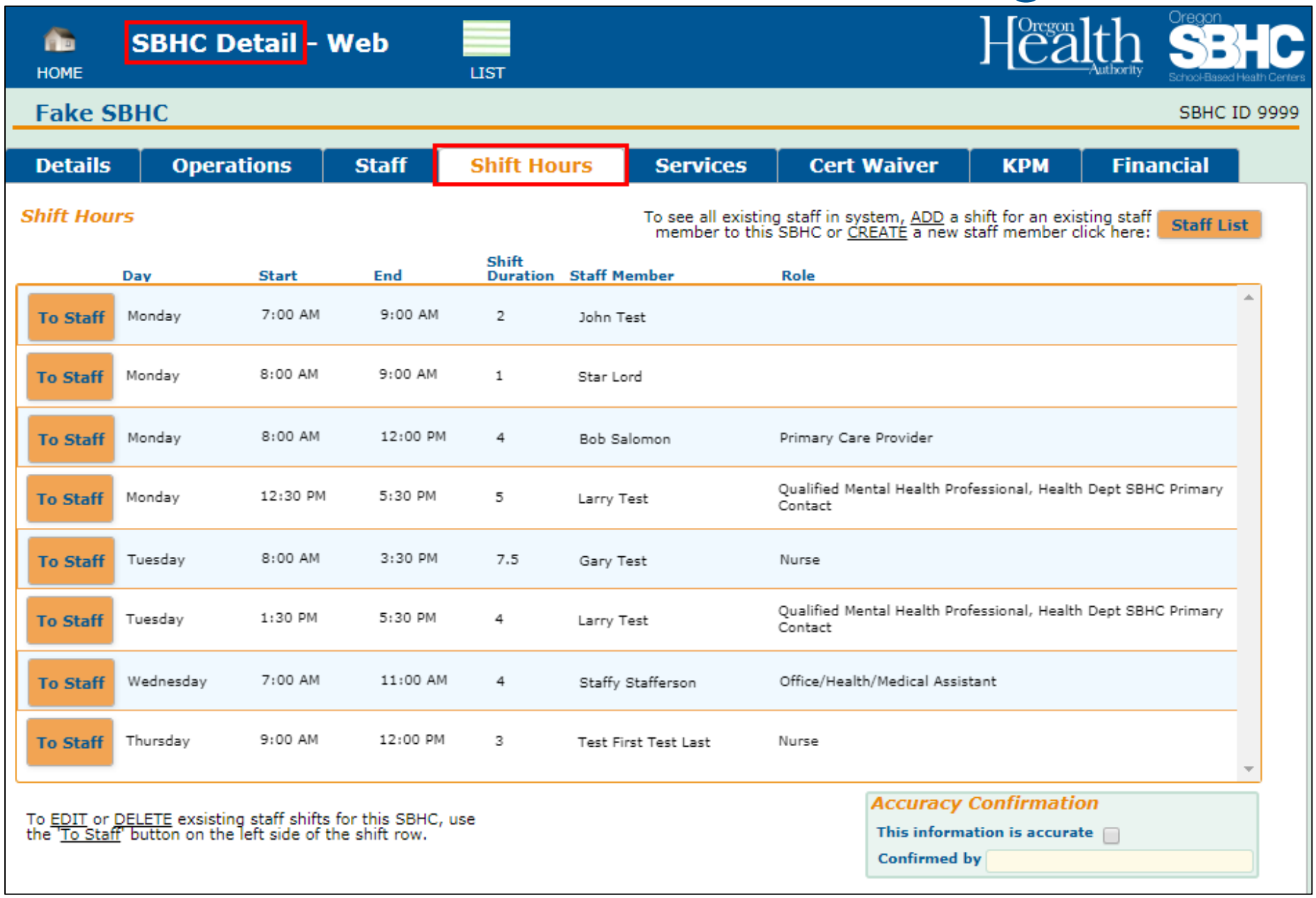


Main Staff ‘tab’ – no changes

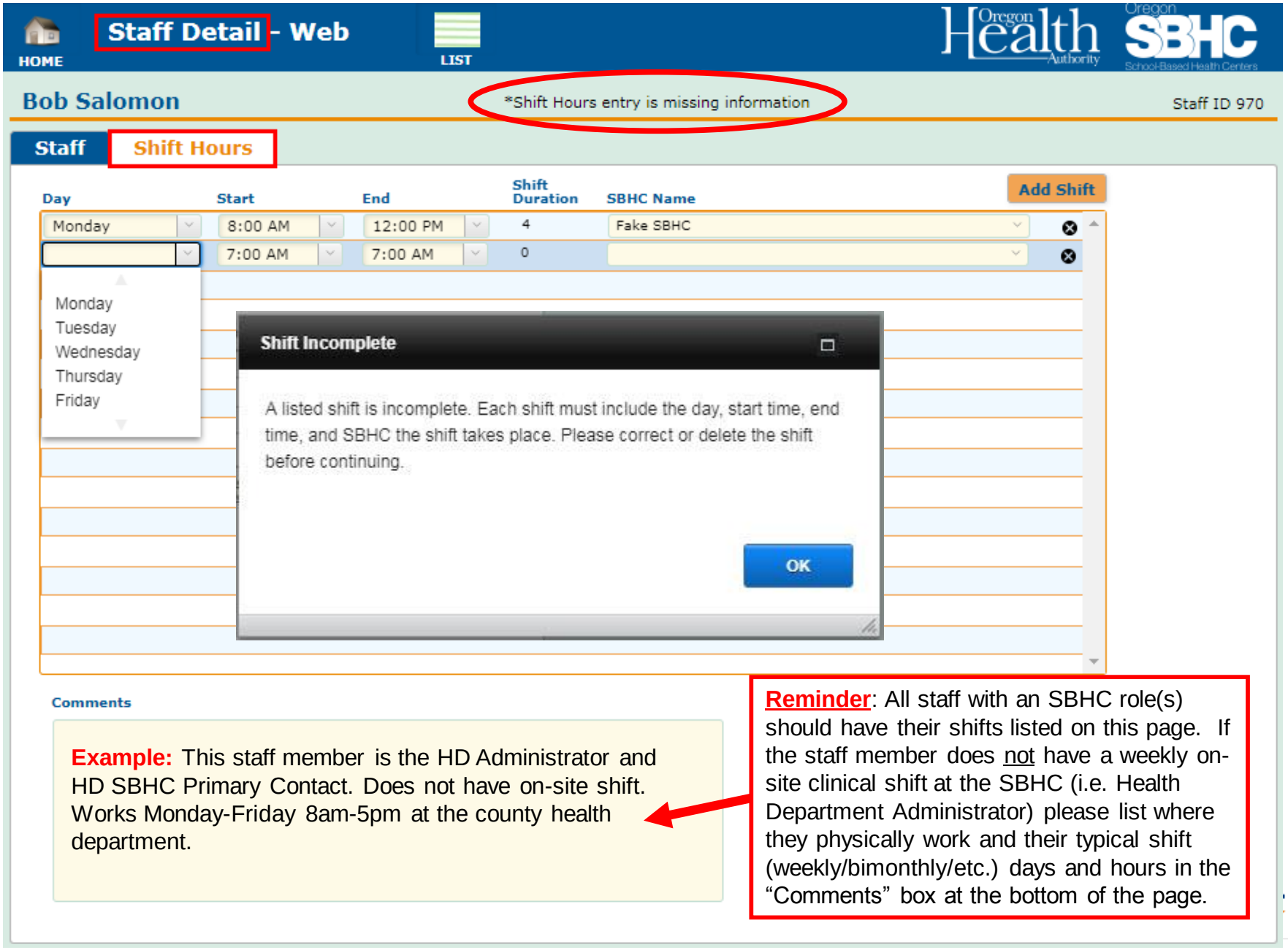
Changes to Individual Staff ‘tab’



Main Shift Hours ‘tab’ – no changes



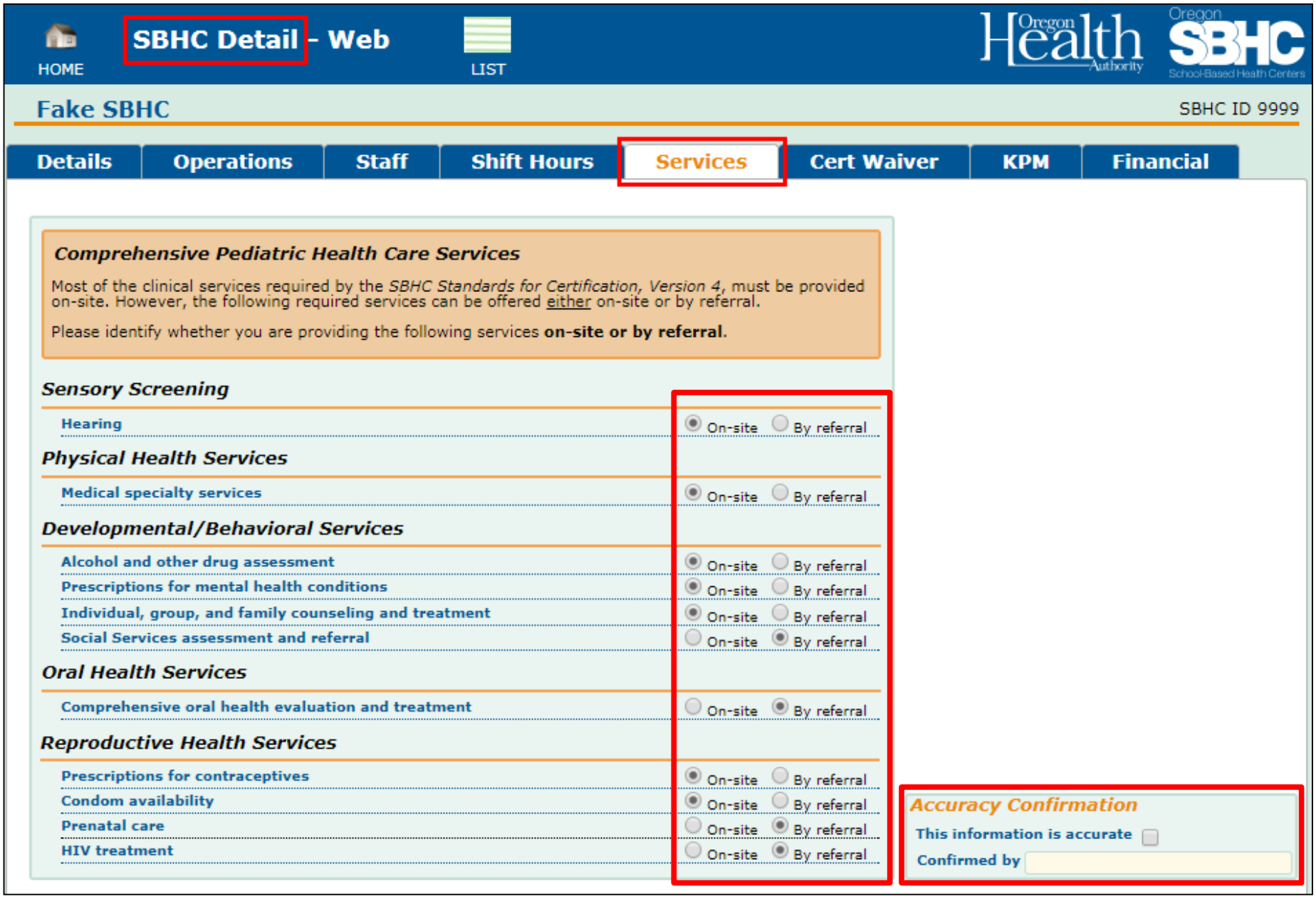
Changes to Individual Shift Hours ‘tab‘



Example: This staff member is the HD Administrator and HD SBHC Primary Contact. Does not have on-site shift. Works Monday-Friday 8am-5pm at the county health department.

Reminder: All staff with an SBHC role(s) should have their shifts listed on this page. If the staff member does not have a weekly on-site clinical shift at the SBHC (i.e. Health Department Administrator) please list where they physically work and their typical shift (weekly/bimonthly/etc.) days and hours in the “Comments” box at the bottom of the page.

Services ‘tab‘ – New!



Changes to Cert Waiver ‘tab’

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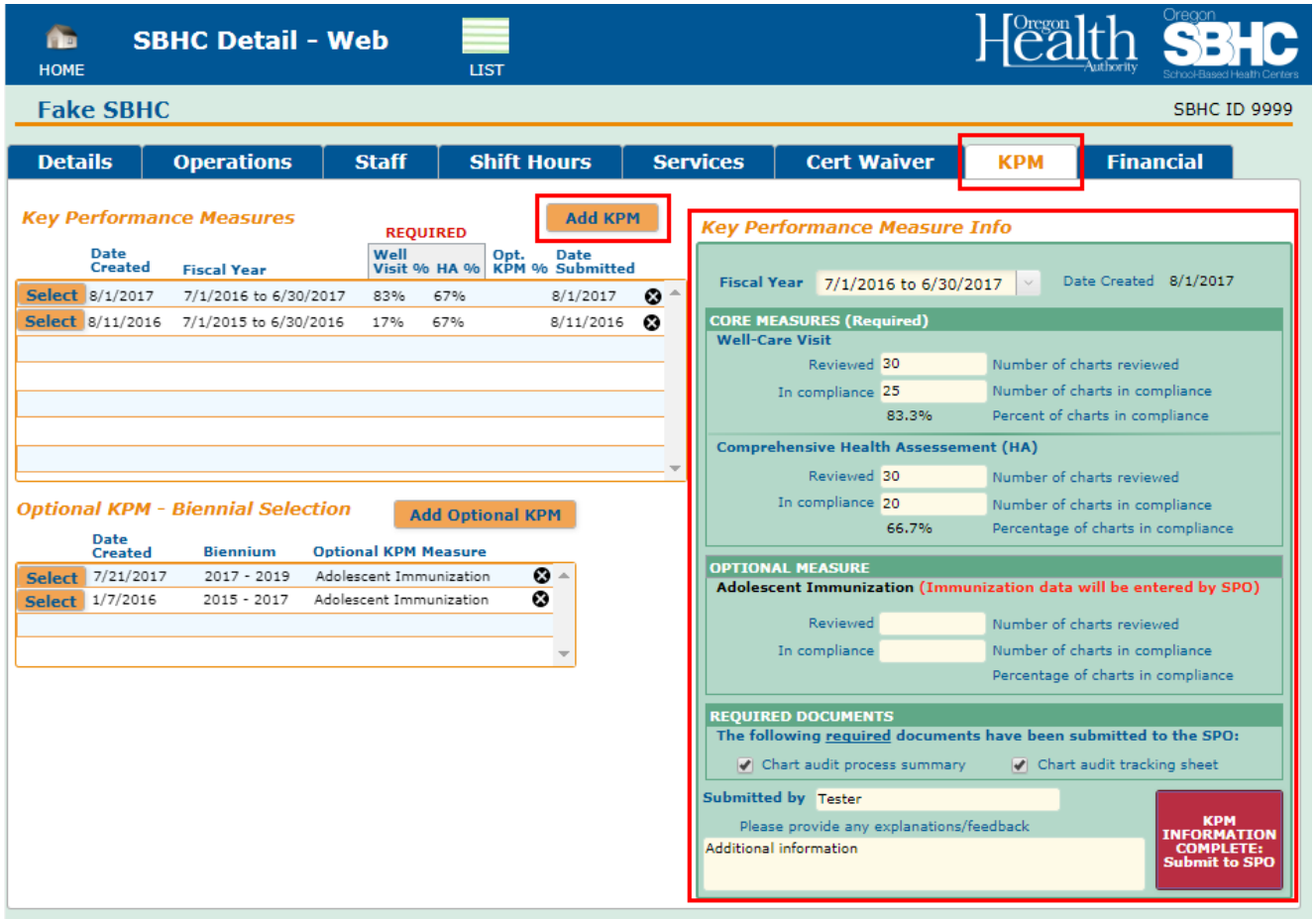
KPM ‘tab’ – no changes



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Reminder – KPM Reference Materials

Guidance Document for each KPM on the 'Data Requirements' page of SBHC website (www.healthoregon.org/sbhc)

- Measure Description
- Eligible Population
- Exclusions (review new wording in documents: "Clients must be excluded if…") Refusals, 2 documented no-shows
- Measure Specifications
- FAQs
- Resources

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KPM Chart Audits

Each SBHC must audit 20% of charts from eligible population

- Minimum of 30 charts, maximum of 50. Charts that are excluded due to the patient's age do not count towards the minimum. Contact Loretta if you're uncertain as to how many charts must be audited.

- The same charts can be audited for each measure as long as the eligible populations are the same (e.g., well visit, health assessment and nutrition screening). For Optional KPMs, do not audit a chart if the patient is not in the age range for the measure.

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Required Chart Audit Documents

SBHCs must submit two documents before entering the KPM results into the Operational Profile

- Chart Audit Process Summary: Explanation of how the SBHC identified patient charts eligible for the audit, how data was obtained and calculated for each KPM. Contact Loretta if you'd like your audit process reviewed before you do your chart audit.
- Chart Audit Tracking Sheet: For all audited charts, SBHC must provide patient ID/MRN, whether or not the chart was in compliance for each measure or if it was excluded (and why it was excluded). Sample spreadsheet is on SPO website.

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Chart Audit – Results Tracking Sheet

Screenshot of sample submission

A23

	A	B	C	D	E	F
1	SBHC name	Patient ID	Core - Well Visit	Core - Health Assess	Optional Measure	Comments
2	Your sbhc	ptid1	Compliance	Refused/Excluded	Non-compliance	
3	Your sbhc	ptid12	Non-compliance	Compliance	Compliance	
4	Your sbhc	ptid13	Compliance	Compliance	Not reviewed	
5	Your sbhc	ptid24	Compliance	Compliance	Compliance	
6	Your sbhc	ptid26	Refused/Excluded	Compliance	Refused/Excluded	
7	Your sbhc	ptid36	Compliance	Compliance	Compliance	
8	Your sbhc	ptid37	Non-compliance	Non-compliance	Non-compliance	
9	Your sbhc	ptid44	Compliance	Refused/Excluded	Non-compliance	
10	Your sbhc	ptid49	Non-compliance	Compliance	Compliance	
11	Your sbhc	ptid51	Compliance	Refused/Excluded	Not reviewed	
12	Your sbhc	ptid55	Compliance	Compliance	Compliance	

Submit MRN or dummy PT ID (SBHC must document the actual MRN and dummy ID for reference)

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Submitting Required KPM Documents to the SPO

- If chart audit tracking sheet contains actual medical record numbers, then it must be submitted via secure email.
- If you don't have a way to initiate a secure email, send Loretta Jenkins an email requesting one. LORETTA.L.JENKINS@dhsoha.state.or.us
- If you chose the Optional Adolescent Immunization Measure, you must submit a spreadsheet with name, date of birth, gender, race and address on all 13-year old clients seen in the SBHC. This information must be submitted via secure email.

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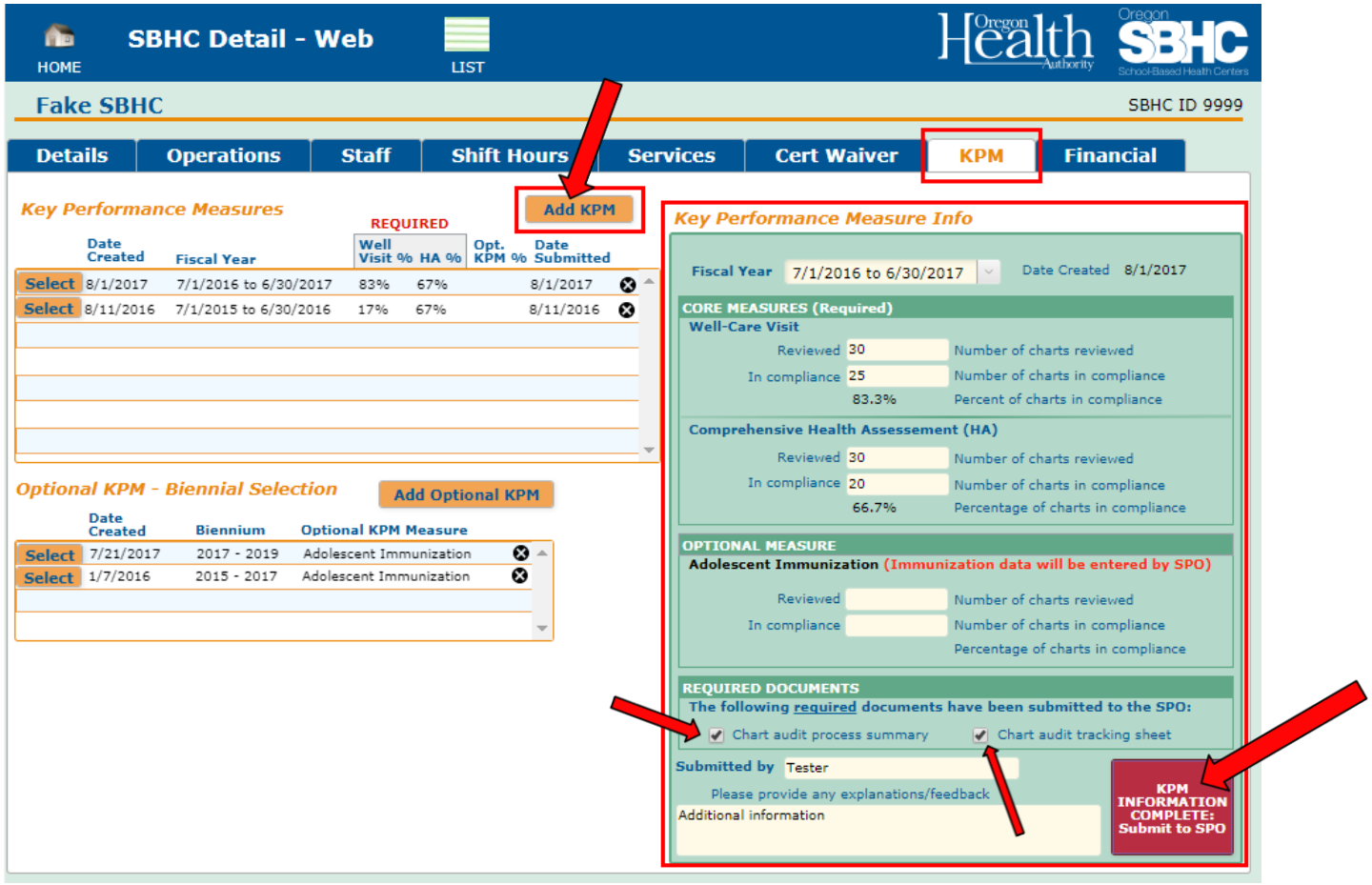
KPM ‘tab’



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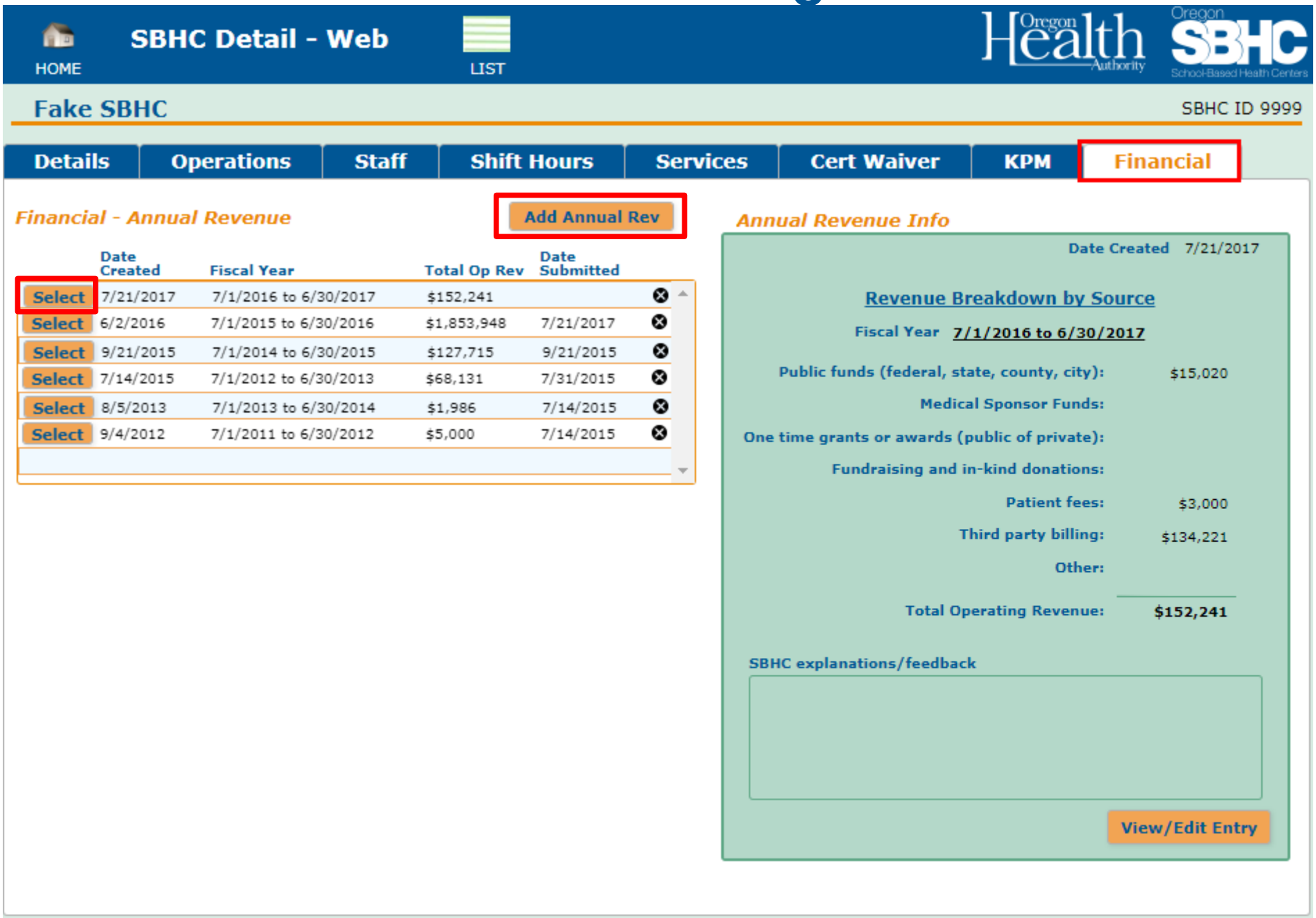
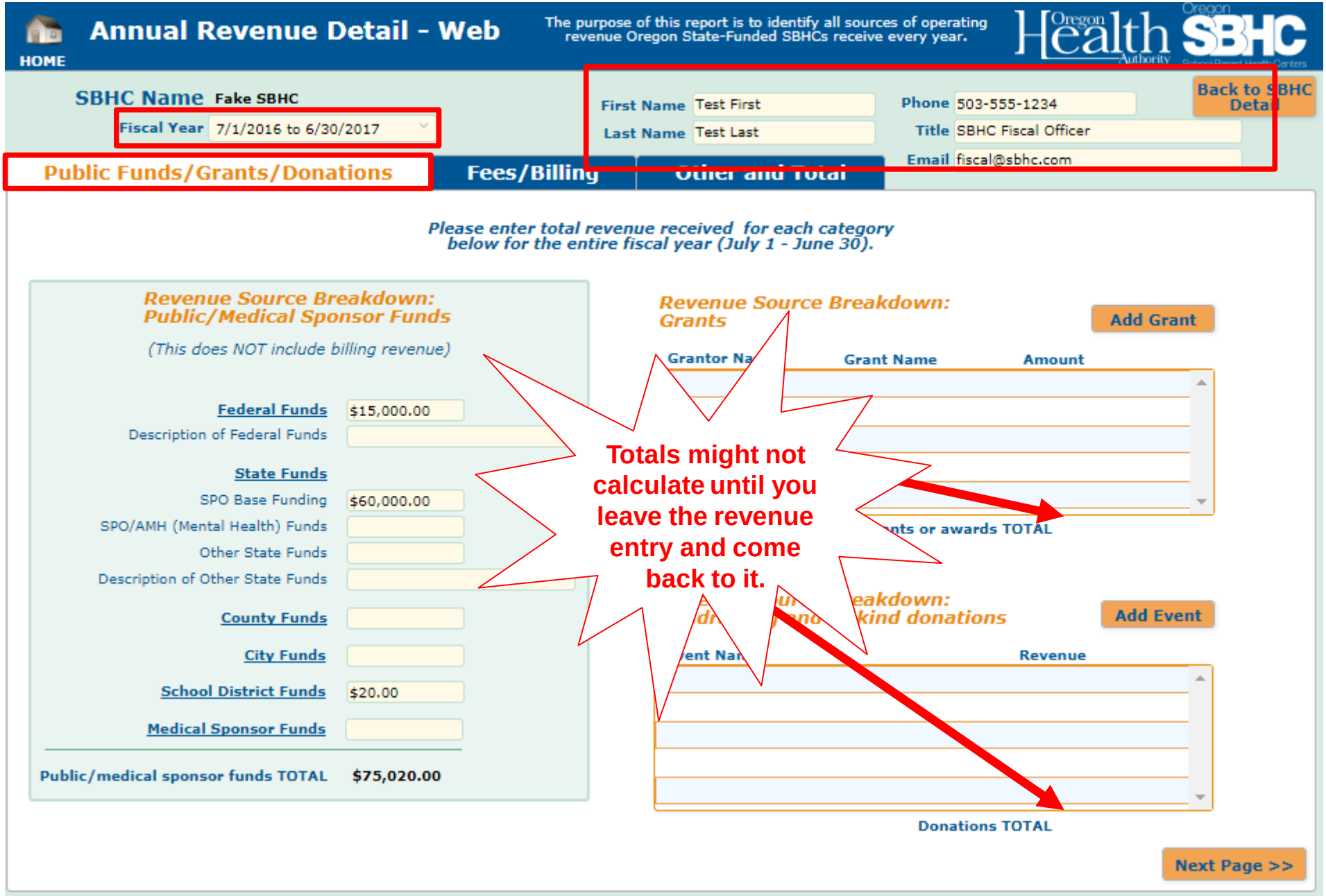
Financial ‘tab’ – no changes



Changes to Annual Revenue Detail 'tabs'



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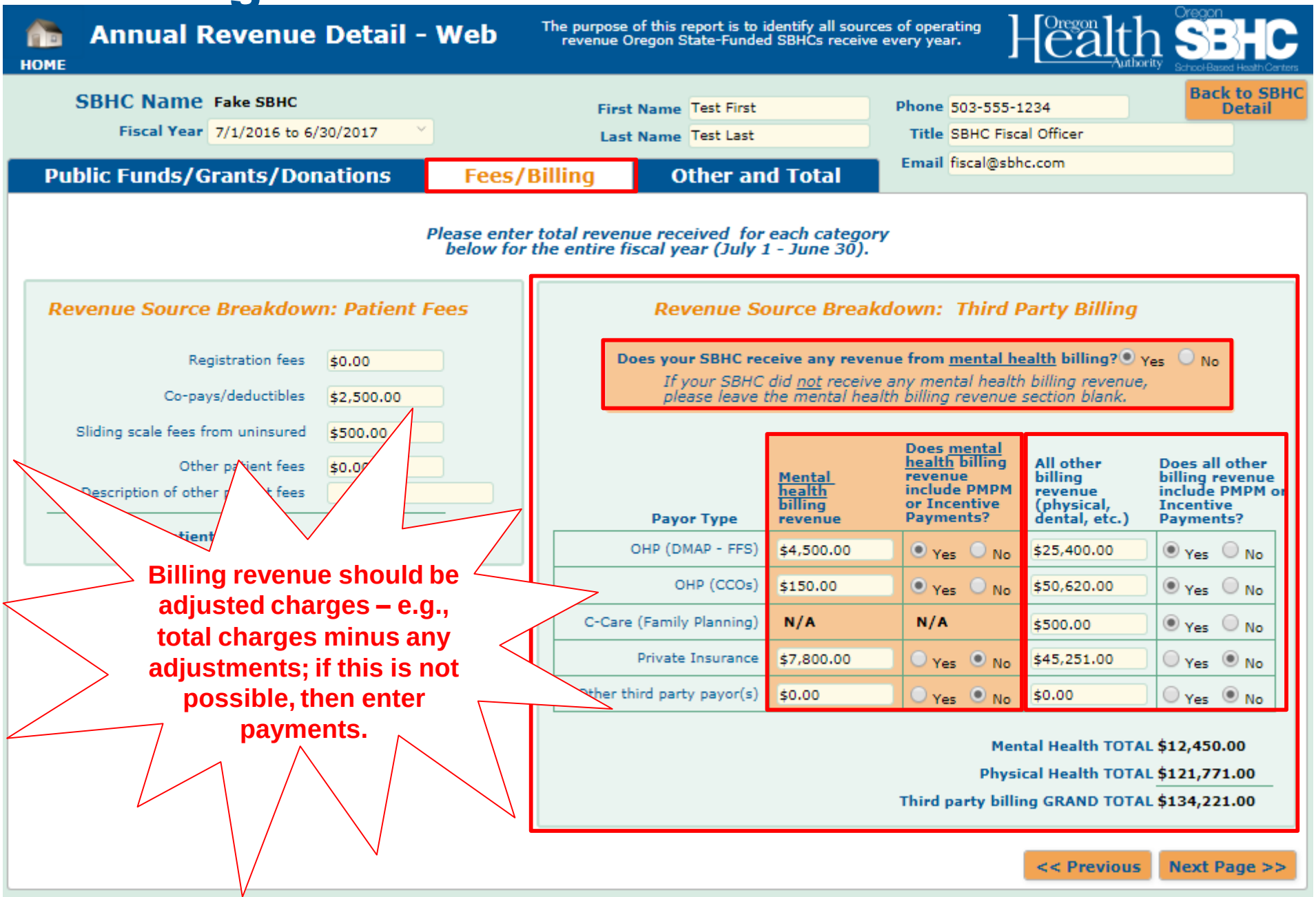
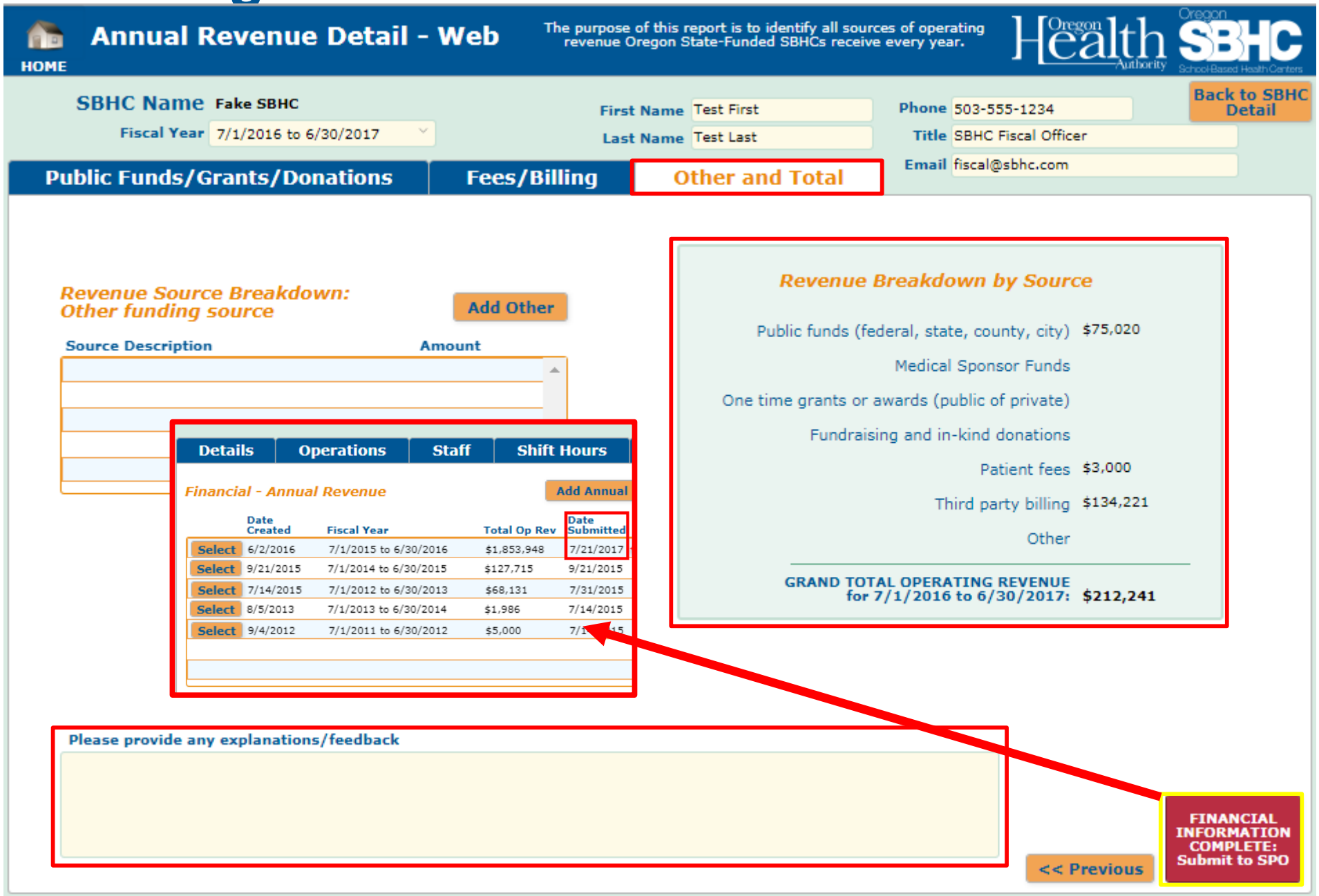


Billing revenue should be adjusted charges – e.g., total charges minus any adjustments; if this is not possible, then enter payments.

Changes to Annual Revenue Detail 'tabs'



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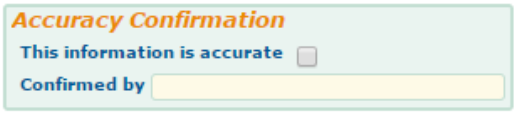
Helpful Hints

- Do not use the browser 'back' button. Use the buttons provided in the Operational Profile.
- Any change you make will be automatically saved
- Check all the accuracy confirmation boxes
  - Located on Details, Operations, Staff , Shift Hours and Services 'tabs'



- Make sure staff information is complete and accurate (i.e.: email, shift hours, off site addresses, etc.)
- Please use Chrome, Safari, Edge or Internet Explorer (11 or higher).
  - Firefox and older versions of Internet Explorer (10 and below) may not work.
- Make sure all KPM percentages are under or at 100%
  - If it's over 100% the information entered is incorrect.

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SPO Operational Profile Audit Process

- Existing Certified SBHCs:
  - The profile audit begins after the October 1st deadline
    - What we are looking for:
      - All the required areas are complete and confirmed
        - » Details, Operations, Staff, Shift Hours, Services, KPM & Financial information
      - SBHC has met minimum operating hours
      - SBHC has met minimum staffing requirements
      - SBHC has met minimum KPM requirements
  - Sites will be notified if they are out of compliance

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Don’t forget…

WE ARE HERE TO HELP!

The audit process is not meant to be an iron hammer. If things look amiss we will help you. Just like the verification site visits, we are your partners and want you to succeed!

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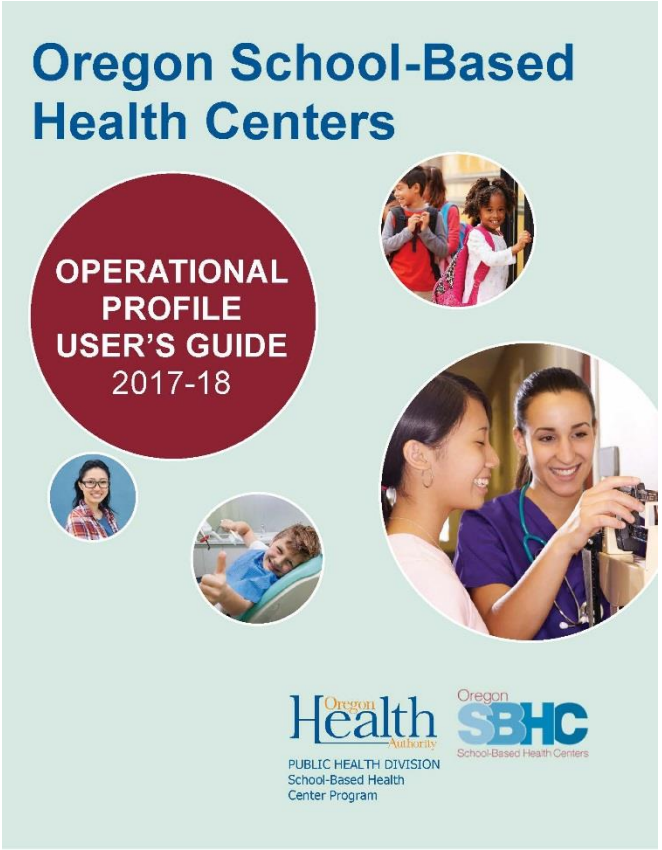
Operational Profile User's Guide

- Step-by-step instructions for making changes in the Operational Profile
- Can be found on the Certification Standards page of our website at: www.healthoregon.org/sbhc



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Contact Information

School-Based Health Center Program
Oregon Public Health Division
800 NE Oregon St., Ste. 805
Portland, OR 97232
P: 971-673-0249
F: 971-673-0250
sbhc.program@dhsoha.state.or.us
www.healthoregon.org/sbhc

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