



# SBHC Operational Profile Training

November 2021



# Background on SBHC Financial Entry

- All certified SBHCs are required to submit Financial Revenue and Funding entries every Fall (October 1; **this year's deadline has been extended to 12/1**).
- Financial data should reflect the previous service year (July 1, 2020 to June 30, 2021).
- Entries are created in the web-based SBHC Operational Profile database
  - PH Revenue (Primary care and Dental services)
    - Federal, State, County, School District, Grants, Fees/Billing
  - MH Revenue (Mental health services only)
    - SPO Mental health funding, Feels/Billing, Grants/Other

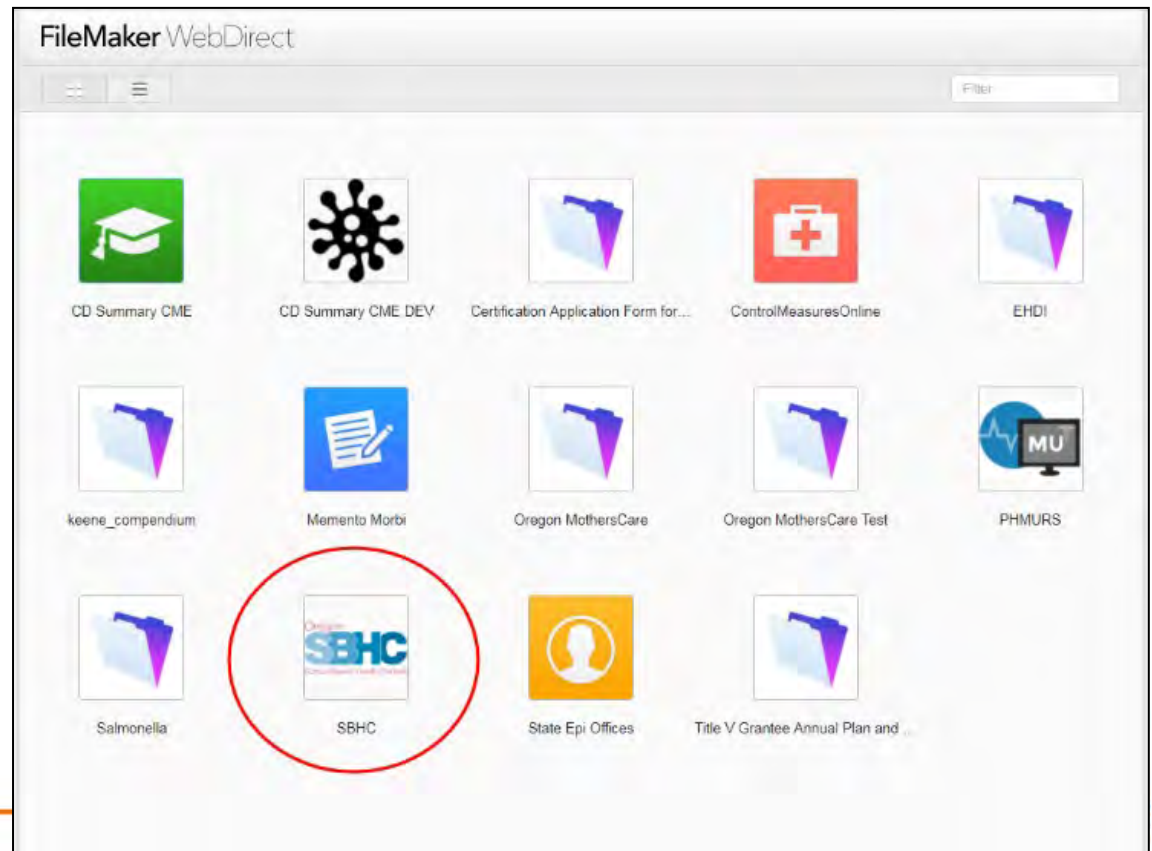
# Operational Profile database

- Review the SBHC Operational Profile User's Guide for detailed step-by-step instructions on how to create and modify a Financial entry.
- The User's Guide is posted on the SPO website:  
[Link to User's Guide](#)
- Email SBHC State Program Office for OP Login:  
[SBHC.program@dhsosha.state.or.us](mailto:SBHC.program@dhsosha.state.or.us)
- Outside Mental Health agencies are assigned a separate login from the SBHC Medical sponsor.
  - MH Agency requesting OP login should indicate the name of their agency and SBHC(s) in their email request.

# Where to get started

- Access the Operational Profile **login** page using Chrome or Internet Explorer:

<http://epiweb.oha.state.or.us/fmi/webd#>



# Financial Revenue Tabs

- Below is a view of the Operational Profile from the Medical sponsor's Login
- Primary care and dental services (PH Revenue tab)
- Mental health services (MH Revenue tab)

The screenshot displays the 'SBHC Detail - Web' interface. At the top, there is a navigation bar with 'HOME' and 'LIST' links, and the 'Oregon Health Authority SBHC' logo. Below the navigation bar, the page title is 'Fake SBHC' with 'SBHC ID 753' on the right. A horizontal menu contains several tabs: 'Details', 'Operations', 'Staff', 'Shift Hours', 'Services', 'Cert Waiver', 'KPM', 'PH Revenue', and 'MH Revenue'. The 'PH Revenue' and 'MH Revenue' tabs are highlighted with red arrows. The main content area is divided into several sections: 'SBHC Info' (Physical and Mailing Address, Phone, Fax, InfoSystem, EMR, Bill 3rd party, Electronic Claim), 'County Info' (County: Cascadiaq, Primary Contact: Testy, Phone: 555-555-5553, Email: TS@cascadiaq.or.gov), 'System/Medical Sponsor Info' (System: zCascadiaTest, Primary Contact: kjsdf, Phone: 503-123-4564, Email: joe@testsystem.com), 'Mental Health Agency' (Oregon Mental Health Agency, Primary Contact: Thanos, Phone: 123-971-1101, Email: OMHA@OMHA.com), and 'Dental Health Agency' (Oregon Dental Agency, Primary Contact: Captain America, Phone: 123-123-1234, Email: ODA\_Dental@Dental). An 'Accuracy Confirmation' box at the bottom right states 'This information is accurate' with a checked box and date '8/7/2019', confirmed by 'Fake Staff'.

# PH Revenue Tab

SBHC Detail - Web

HOME LIST

Oregon Health Authority SBHC School-Based Health Centers

Fake SBHC SBHC ID 753

Details Operations Staff Shift Hours Services Cert Waiver KPM **PH Revenue** MH Revenue

**Financial - Annual Revenue** [Add Annual Rev](#)

Date Created	Fiscal Year	Total Op Rev	Date Submitted	
<a href="#">Select</a> 8/7/2019				⊗
<a href="#">Select</a> 7/26/2019	7/1/2018 to 6/30/2019			⊗
<a href="#">Select</a> 7/9/2019				⊗
<a href="#">Select</a> 6/14/2019	7/1/2018 to 6/30/2019	\$975,626	7/1/2019	⊗
<a href="#">Select</a> 6/12/2019	7/1/2017 to 6/30/2018	\$24	6/13/2019	⊗

**Annual Revenue Info** Date Created 6/14/2019

Revenue Breakdown by Source  
Fiscal Year **7/1/2018 to 6/30/2019**

Public funds (federal, state, county, city):	\$778,979
Medical Sponsor Funds:	\$98,777
One time grants or awards (public or private):	
Fundraising and in-kind donations:	
Patient fees:	\$80,000
Third party billing:	\$8,000
Other:	\$9,870
<b>Total Operating Revenue:</b>	<b>\$975,626</b>

[explanations/feedback](#)


[View/Edit Entry](#)


Click "Add Annual Rev" button to create a new PH entry.

Click "Select" button to view previous entries.



# PH Revenue Detail 'tabs'


**Physical Health Revenue Detail - Web**



HOME The purpose of this report is to identify all sources of operating revenue Oregon State-Funded SBHCs receive every year.

**SBHC Name** Fake SBHC [Back to SBHC Detail](#)

**Fiscal Year** 7/1/2020 to 6/30/2021

**First Name** First Test **Phone** 5035555555  
**Last Name** Last Test **Title** SBHC Fiscal Officer  
**Email** fiscal@sbhc.com

Public Funds/Grants/Donations
Fees/Billing
Other and Total

Select Fiscal Year and provide Contact Information.

**Public/Medical Sponsor Funds**  
(This does NOT include billing revenue)

<b>Federal Funds</b>	\$2.00
Description of Federal Funds	Stuff
<b>State Funds</b>	
SPO Base Funding	\$69,879.00
SPO/AMH (Mental Health) Funds	
Other State Funds	\$8,000.00
Description of Other State Funds	more stuff
<b>County Funds</b>	\$465.00
<b>City Funds</b>	\$654,987.00
<b>School District Funds</b>	\$45,646.00
<b>Medical Sponsor Funds</b>	\$98,777.00
<b>Public/medical sponsor funds TOTAL</b>	<b>\$877,756.00</b>

Revenue received for each category entire fiscal year (July 1 - June 30).

**Revenue Source Breakdown: Grants** [Add Grant](#)

Grantor Name	Grant Name	Amount

Add grants, fundraising and in-kind donations.

**Revenue Source Breakdown: Fundraising and in-kind donations** [Add Event](#)

Event Name	Revenue

**Donations TOTAL**

# PH Revenue Detail 'tabs'



## Physical Health Revenue Detail - Web

The purpose of this report is to identify all sources of operating revenue Oregon State-Funded SBHCs receive every year.



SBHC Name **7/1/2020 to 6/30/2021**

Fiscal Year 7/1/2018 to 6/30/2019

First Name First Test

Phone 5035555555

[Back to SBH C Detail](#)

Last Name Last Test

Title SBHC Fiscal Officer

Email fiscal@sbhc.com

Public Funds/Grants/Donations

**Fees/Billing**

Other and Total

Please enter total revenue received for each category below for the entire fiscal year (July 1 - June 30).

### Revenue Source Breakdown: Patient Fees

Registration fees \$80,000.00

Co-pays/deductibles

Sliding scale fees from uninsured

Other patient fees

Description of other patient fees

Patient fees TOTAL \$80,000.00

### Revenue Source Breakdown: Third Party Billing

Payor Type	Physical / dental health revenue	Does billing revenue include PMPM or Incentive Payments?
OHP (DMAP - FFS)	\$8,000.00	<input checked="" type="radio"/> Yes <input type="radio"/> No
OHP (CCOs)		<input type="radio"/> Yes <input type="radio"/> No
C-Care (Family Planning)		<input type="radio"/> Yes <input type="radio"/> No
Private Insurance		<input type="radio"/> Yes <input type="radio"/> No
Other third party payor(s)		<input type="radio"/> Yes <input type="radio"/> No

Physical Health TOTAL \$8,000.00

Third party billing GRAND TOTAL \$8,000.00

This section is for viewing historic entry only. The MH Billing Revenue has been moved to a separate tab on the SBHC Detail page.

Payor Type	Mental health billing revenue	Does mental health billing revenue include PMPM or Incentive Payments?
Other third party payor(s)		<input type="radio"/> Yes <input type="radio"/> No

Mental Health TOTAL

Mental Health revenue is entered on a separate tab

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

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# PH Revenue Detail 'tabs'



HOME

## Physical Health Revenue Detail - Web

The purpose of this report is to identify all sources of operating revenue Oregon State-Funded SBHCs receive every year.



SBHC Name Fake SBHC

Fiscal Year 7/1/2020 to 6/30/2021

First Name First Test

Last Name Last Test

Phone 5035555555

Title SBHC Fiscal Officer

Email fiscal@sbhc.com

Back to SBHC Detail

Public Funds/Grants/Donations

Fees/Billing

Other and Total

### Revenue Source Breakdown: Other funding source

Add Other

Source Description	Amount
LKJSD STUFF	\$9,870.00

Other funding sources TOTAL \$9,870.00

If there are other funding sources that support physical or oral health services related to the SBHC, click the Add Other button and enter the description.

### Revenue Breakdown by Source

Public funds (federal, state, county, city) \$778,979

Medical Sponsor Funds \$98,777

One time grants or awards (public or private)

Fundraising and in-kind donations

Patient fees \$80,000

Third party billing \$8,000

Other \$9,870

GRAND TOTAL OPERATING REVENUE for 7/1/2018 to 6/30/2019: \$975,626

Click this button when you've finished your submission. We will assume it is INCOMPLETE until then.

Please provide any explanations/feedback

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FINANCIAL INFORMATION COMPLETE: Submit to SPO

# MH Revenue Tab

- Separate Account Login and Password for an outside Mental Health agency to enter SBHC-related revenue and funding into the OP database.  
Email request for login: [SBHC.PROGRAM@DHSOHA.STATE.OR.US](mailto:SBHC.PROGRAM@DHSOHA.STATE.OR.US).
- Medical sponsors providing direct MH services will use their existing OP Login and Password.
- The Medical sponsor will not have viewing access to the revenue entry when the outside Mental Health agency uses their own OP Login. *SPO will ensure MH Financial entries are submitted by MH agency.*

# MH Revenue Tab

SBHC Detail - Web

HOME LIST

Oregon Health Authority SBHC

Fake SBHC SBHC ID 753

Details Operations Staff Shift Hours Services Cert Waiver KPM PH Revenue **MH Revenue**

*Financial - Mental Health Billing*

**Add MH Billing**


	Date Created	Fiscal Year	Total Op Rev	Date Submitted
<b>Select</b>	8/7/2019			
<b>Select</b>	8/7/2019			
<b>Select</b>	8/27/2019	7/1/2017 to 6/30/2018	\$5,625	8/19/2019

Click the "Add MH Billing" button to create new entry

Click the "Select" button to view or modify an entry

# MH Revenue Detail tabs

HOME



**SBHC Name** Fake SBHC

**Fiscal Year** 7/1/2020 to 6/30/2021

**First Name** test person 5      **Phone** 555-5555

**Last Name** supa 5              **Title** Master 5

**Email** big5@email.5

[back to SBHC Detail](#)

**Billing Revenue and State Funds**

**Other and Total**

Revenue received for each category during fiscal year (July 1 - June 30).

**State Funds**

SPO Mental Health Funding \$555

**Revenue Source Breakdown: Third Party Billing**

Payor Type	Mental health billing revenue	Does mental health billing revenue include PMPM or Incentive Payments?
OHP (DMAP - FFS)	\$55.00	<input checked="" type="radio"/> Yes <input type="radio"/> No
OHP (CCOs)	\$5.00	<input checked="" type="radio"/> Yes <input type="radio"/> No
Private Insurance	\$5.00	<input checked="" type="radio"/> Yes <input type="radio"/> No
Other third party payor(s)	\$5.00	<input checked="" type="radio"/> Yes <input type="radio"/> No

**Mental Health TOTAL \$70.00**

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Select Fiscal Year and provide Contact Information.

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

# MH Revenue Detail tabs

**Mental Health Revenue Detail** The purpose of this report is to identify all sources of mental health revenue Oregon State-Funded SBHCs receive every year. **Oregon Health Authority SBHC** School-Based Health Centers

HOME

SBHC Name  First Name  Phone  [Back to SBHC Detail](#)

Fiscal Year  Last Name  Title

Billing Revenue and State Funds **Other and Total** Email

**Revenue Source Breakdown:**  
**Other funding source**

Source Description	Amount	
Test 5	\$5.00	<input type="checkbox"/>
test 2	\$6.00	<input type="checkbox"/>

[Add Other](#)

Other funding sources TOTAL \$11.00

If there are other funding sources that support mental health services related to the SBHC, click the "Add Other" button and enter the description.

Please provide any explanations/feedback

Enter any comments, additional information here.

**Revenue Breakdown by Source**

State funds \$555  
Third party billing \$70  
Other \$11

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**GRAND TOTAL OPERATING REVENUE**  
for 7/1/2017 to 6/30/2018: \$636

Click this button when you've finished your submission. We will assume it is INCOMPLETE until then.

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**FINANCIAL INFORMATION COMPLETE: Submit to SPO**

# Helpful Hints

- The OP User's Guide can be found on the Certification Standards page as well as the Data Requirements page of the SPO website at: [www.healthoregon.org/sbhc](http://www.healthoregon.org/sbhc)
- ONLY use Chrome, Safari, Edge or Internet Explorer (11 or higher).
  - Firefox and older versions of Internet Explorer will not work reliably.
- Do not use your internet browser 'back' button. Use the buttons in the Operational Profile.
- Any change made in the database is automatically saved.



# SPO Operational Profile Audit Process

- Audit begins after the December 1<sup>st</sup> deadline
- SBHCs or Outside Mental health agencies will be notified if their Financial Revenue entry is incomplete or if there are questions about the submission.

# 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](mailto:sbhc.program@dhsoha.state.or.us)

[www.healthoregon.org/sbhc](http://www.healthoregon.org/sbhc)

Oregon  
Health  
Authority