SBHC Operational Profile Training

November 2021

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

Oregon SBHC School-Based Health Centers

Oregon Health Authority

SBHC Site Coordinator role & responsibilities

- Manage Operational Profile
  - Oct 1st deadline (*12/1 this year*)
  - Update as changes occur throughout the year
  - Identify staff for certification required SBHC roles
- Attend Coordinators Meetings
  - October, Winter, Spring
- Forward SPO email communications to SBHC staff as needed
- Communicate with partners
  - LPHA, outside MH Agencies, SBHC Staff, SPO, etc.
- Submit Encounter Data
  - Mid-year, year-end
- Submit Satisfaction Surveys
  - Mid-year, year-end
- Prepare for and participate in site visits

Oregon SBHC School-Based Health Centers

Oregon Health Authority

Why have an Operational Profile?

- Demonstrates sites are in compliance with the Standards for Certification, Version 4 such as:
  - Staffing roles & shifts, hours of operation, identify services offered on-site or by referral, waivers, Key Performance Measures & financial information
- 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.
- Provides a snapshot of the SBHC
  - Population served, staffing beyond certification requirements, specific services provided (contraception, etc.)

Oregon SBHC School-Based Health Centers

Oregon Health Authority

Why have an Operational Profile?

- Demonstrates and showcases all the great services provided above and beyond the certification requirements.

- Provides a comprehensive overview of what the SBHC does for the student population and community members:
  - Population served
  - Staffing beyond certification-required roles
  - Specific services provided on-site (developmental, behavioral, reproductive health, contraceptive services, etc.)

When to fill out and Update the Profile

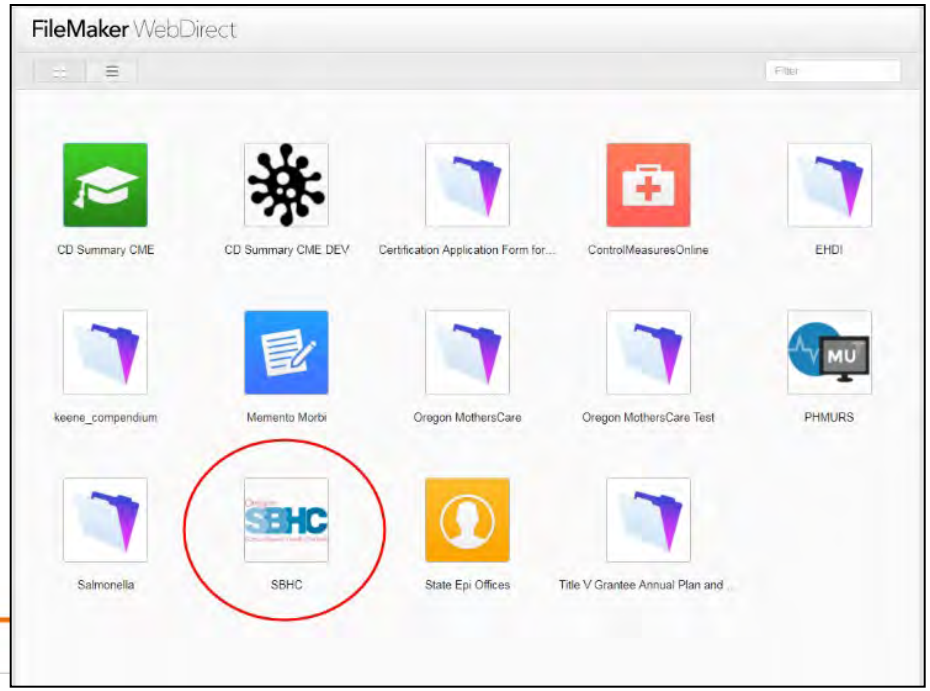
- For new sites, after initial certification application approval: By date provided by SPO after application has been approved.
- After certification – October 1st Deadline (this year's deadline is 12/1/2021): Yearly renewal
- As changes occur throughout the year: Sites are required to keep their Operational Profile up to date
- Prior to a verification site visit

Oregon SBHC School-Based Health Centers

Oregon Health Authority

Where to get started

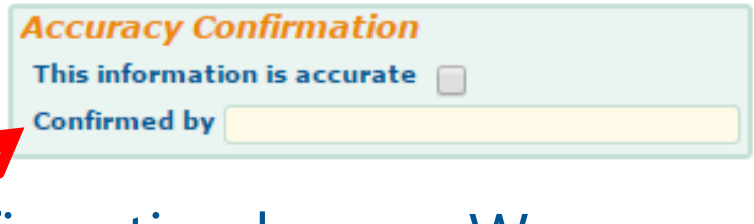
- Access the **login** page using Chrome or Internet Explorer: **http://epiweb.oha.state.or.us/fmi/webd#**
- Link is posted on SPO website (Certification Standards page, Data requirements page)
- Login information is issued by SPO
- SPO Email: sbhc.program@dhsoha.state.or.us



Oregon SBHC School-Based Health Centers

Operational Profile structure

- You must review, update, confirm accuracy or create entries on the following tabs/pages in the database:
  - Details
    - County, Medical Sponsor, Mental Health and Dental Health agency contact
  - Operations
  - Staff
  - SBHC Shift Hours
  - Services
  - KPMs
  - Financial



- You must mark the accuracy confirmation boxes. We assume the OP tab is incomplete if the box is unchecked.

Oregon SBHC School-Based Health Centers

Oregon Health Authority

Reminder

- SBHC **details**, **operations**, **staff, shift hours and services** information should be for the current year (July 1, 2021 to June 30, 2022).

- **KPM** and **Financial data** should be from the previous year (July 1, 2020 to June 30, 2021).

Oregon SBHC School-Based Health Centers

Oregon Health Authority

Operational Profile database layout

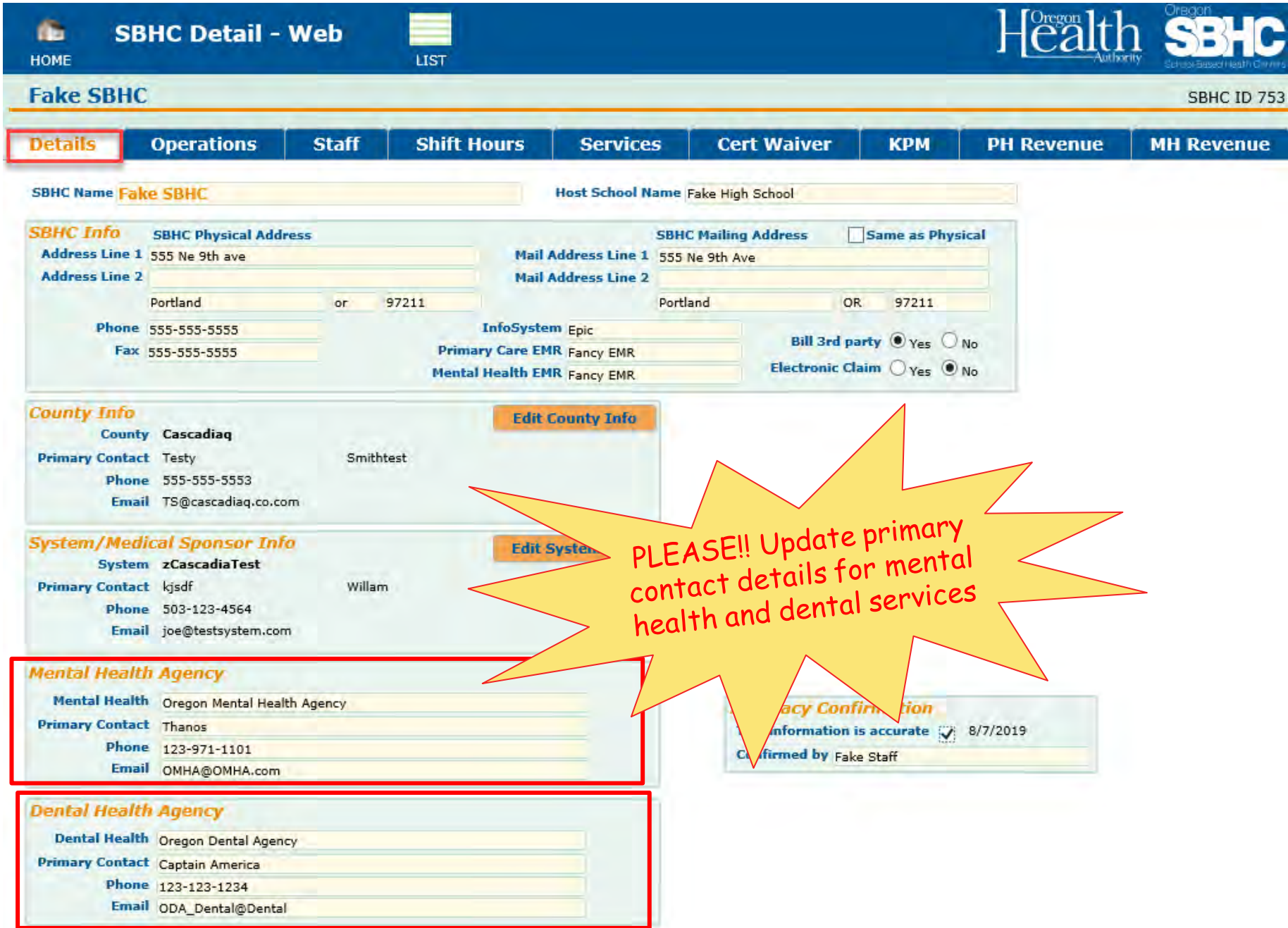
- The next several slides include screenshots from the database displaying information collected on each tab and a few helpful hints.
- This presentation is only a high-level overview.
- Review the Operational Profile User's Guide for detailed step-by-step instructions on how to update and create entries in each section of the database.
- The User's Guide is posted on the SPO website and is referenced on both the Certification and Data pages:

Link to User's Guide

Oregon SBHC School-Based Health Centers

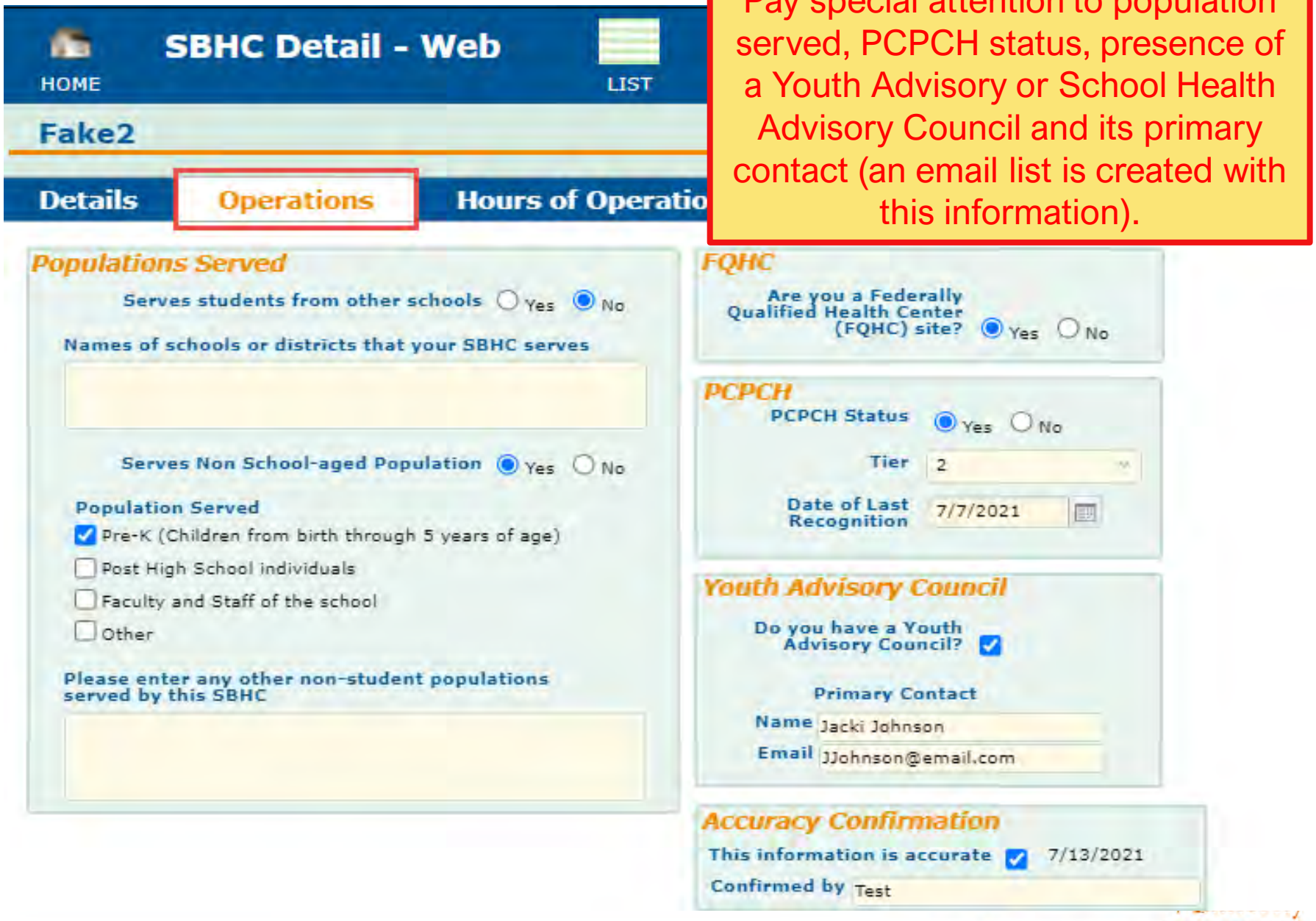
Oregon Health Authority

Details ‘tab’


HOME
SBHC Detail - Web
LIST
Oregon Health Authority
Oregon SBHC
Fake SBHC
SBHC ID 753
Details
Operations
Staff
Shift Hours
Services
Cert Waiver
KPM
PH Revenue
MH Revenue
SBHC Name Fake SBHC
Host School Name Fake High School
SBHC Info
SBHC Physical Address
Address Line 1 555 Ne 9th ave
Address Line 2
Portland or 97211
Phone 555-555-5555
Fax 555-555-5555
SBHC Mailing Address
Same as Physical
Mail Address Line 1 555 Ne 9th Ave
Mail Address Line 2
Portland OR 97211
InfoSystem Epic
Primary Care EMR Fancy EMR
Mental Health EMR Fancy EMR
Bill 3rd party Yes No
Electronic Claim Yes No
County Info
Edit County Info
County Cascadiaq
Primary Contact Testy Smithtest
Phone 555-555-5553
Email TS@cascadiaq.co.com
System/Medical Sponsor Info
Edit Systen
System zCascadiaTest
Primary Contact kjsdf Willam
Phone 503-123-4564
Email joe@testsystem.com
Mental Health Agency
Mental Health Oregon Mental Health Agency
Primary Contact Thanos
Phone 123-971-1101
Email OMHA@OMHA.com
Dental Health Agency
Dental Health Oregon Dental Agency
Primary Contact Captain America
Phone 123-123-1234
Email ODA_Dental@Dental
8/7/2019
Fake Staff
PLEASE!! Update primary contact details for mental health and dental services

Operations ‘tab’

Annual update of the tab is required. Pay special attention to population served, PCPCH status, presence of a Youth Advisory or School Health Advisory Council and its primary contact (an email list is created with this information).



Hours of Operation 'tab'

This tab is used to evaluate whether a site meets certification requirements for days of the week and total open hours. **You should confer with an Outside MH Agency to ensure hours are properly documented.**

Staff - Roles

- SBHCs are required to assign the following certification-required roles:
  - Immunization Coordinator
  - Laboratory Coordinator
  - Medical Director
  - Office/Health/Medical Assistant
  - Primary Care Provider
  - Privacy Official
  - Quality Assurance Coordinator
  - SBHC Administrator
  - SBHC Site Coordinator
  - Health Department SBHC Primary Contact *(only for sites whose contracts go through their Local Public Health Authority)*
- Staff can hold multiple roles
- SBHC role descriptions can be found in the Standards for Certification, Version 4 on the Certification Standards page of our website (www.healthoregon.org/sbhc).

Oregon SBHC School-Based Health Centers

Oregon Health Authority

Entering staff in the Operational Profile

Staff who have on-site shifts at the SBHC or who fill any SBHC certification-required role must be entered into the database.

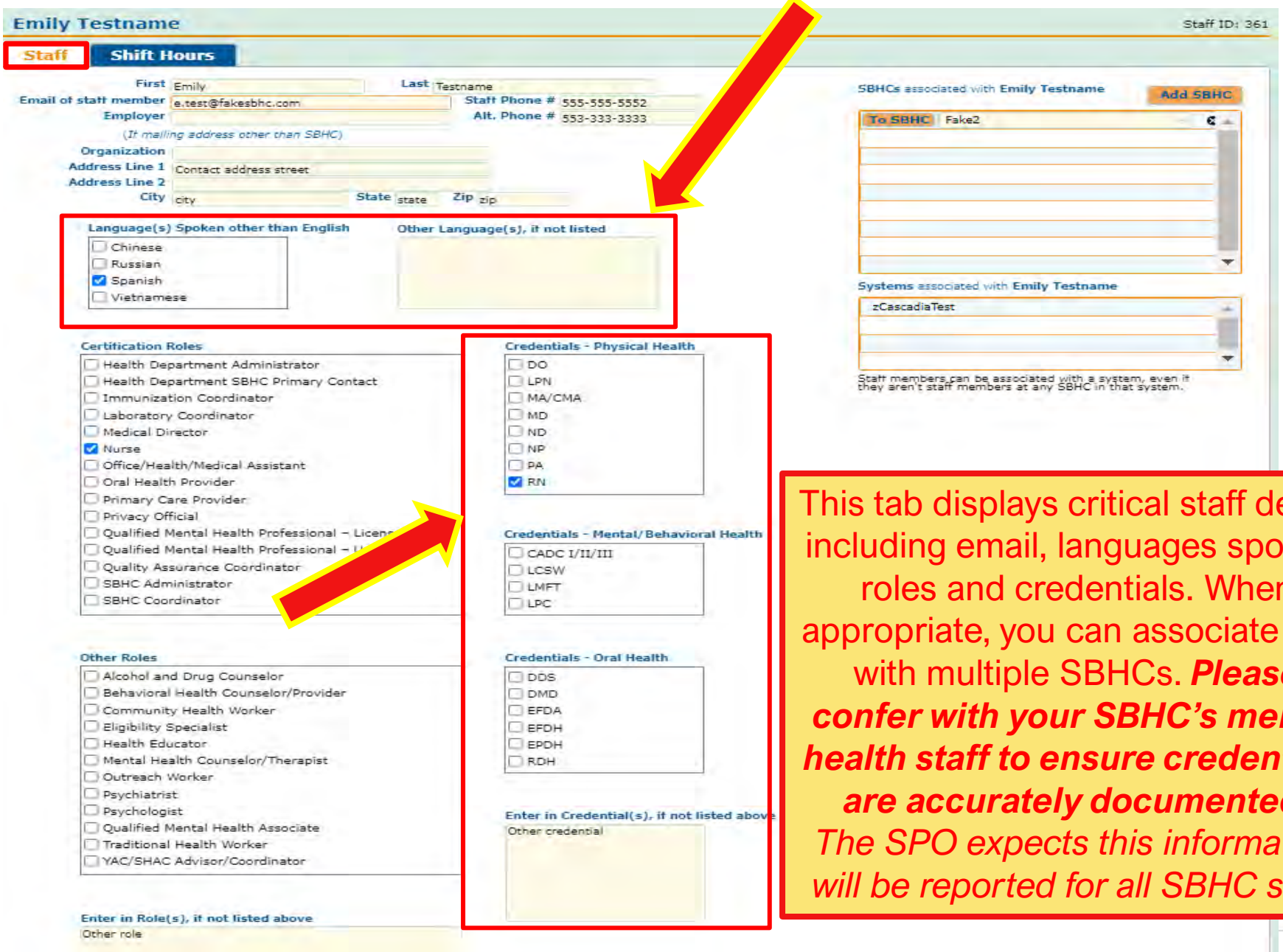
- Staff who work less often than weekly (i.e., monthly, bi-weekly)
- Staff whose hours are not used to meet certification requirements
- Additional roles are available for selection and those staff should be entered in the OP to reflect the SBHC's *staffing model*.

  Alcohol and Drug counselor, Behavioral Health counselor/provider, Community health worker, Eligibility specialist, Health educator, MH counselor/therapist, Oral Health provider, Outreach worker, Psychiatrist, Psychologist, QMHA, Traditional health worker, YAC/SHAC Advisor/Coordinator

Oregon SBHC School-Based Health Centers

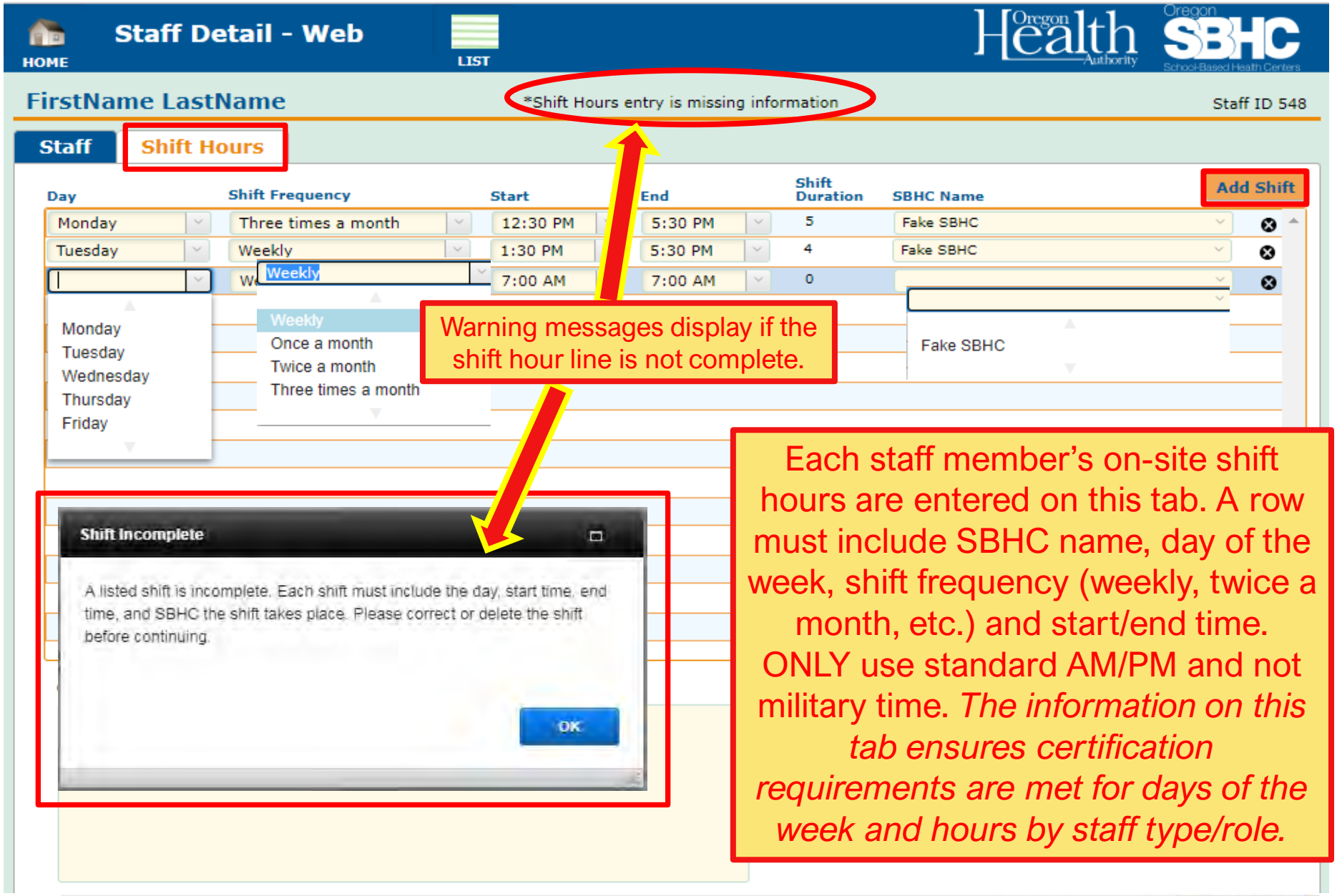
Oregon Health Authority

Individual Staff 'tab' – NEW *Languages spoken*



This tab displays critical staff details including email, languages spoken, roles and credentials. When appropriate, you can associate staff with multiple SBHCs. ***Please confer with your SBHC's mental health staff to ensure credentials are accurately documented.*** *The SPO expects this information will be reported for all SBHC staff.*

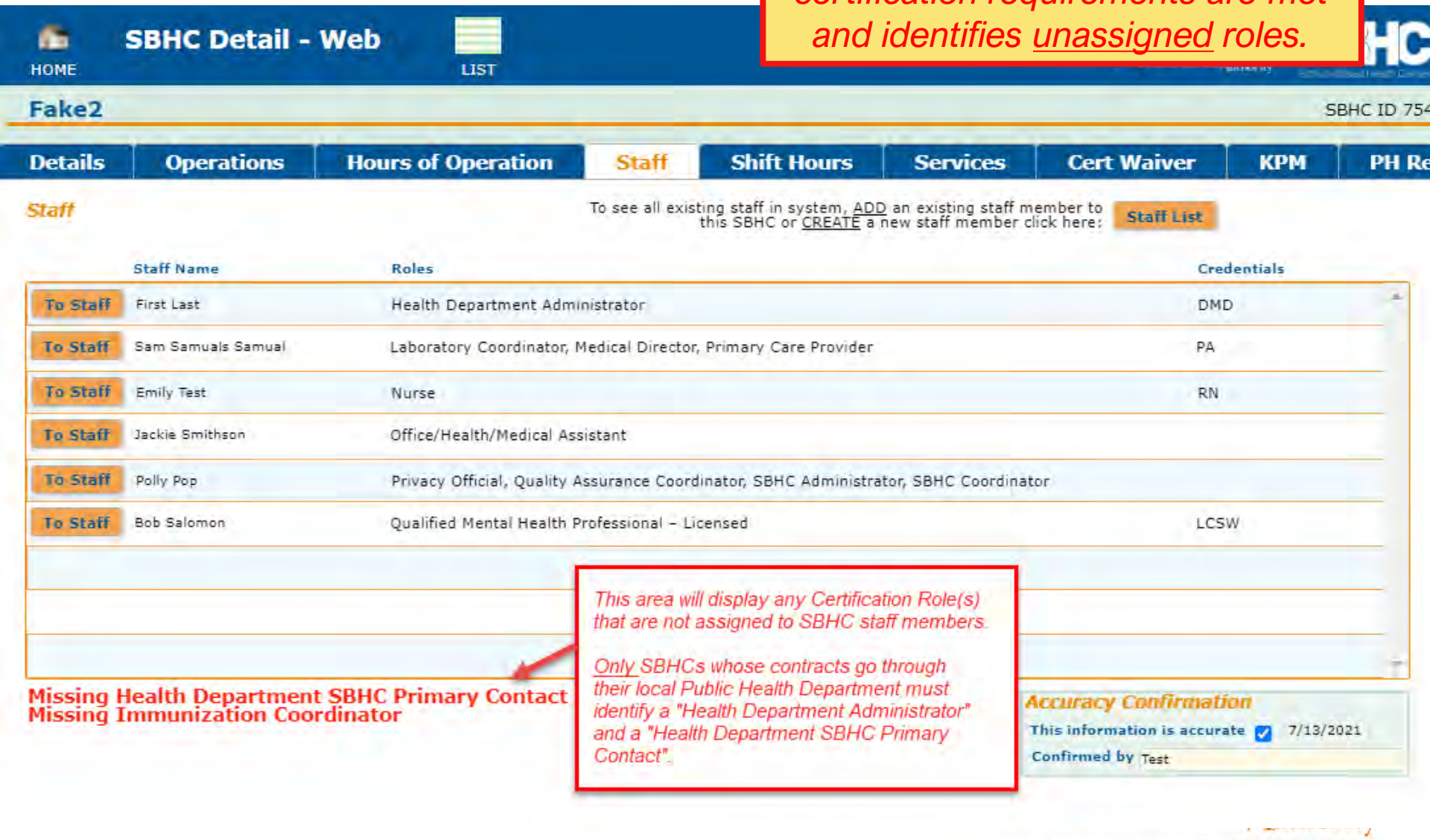
Individual Shift Hours 'tab'



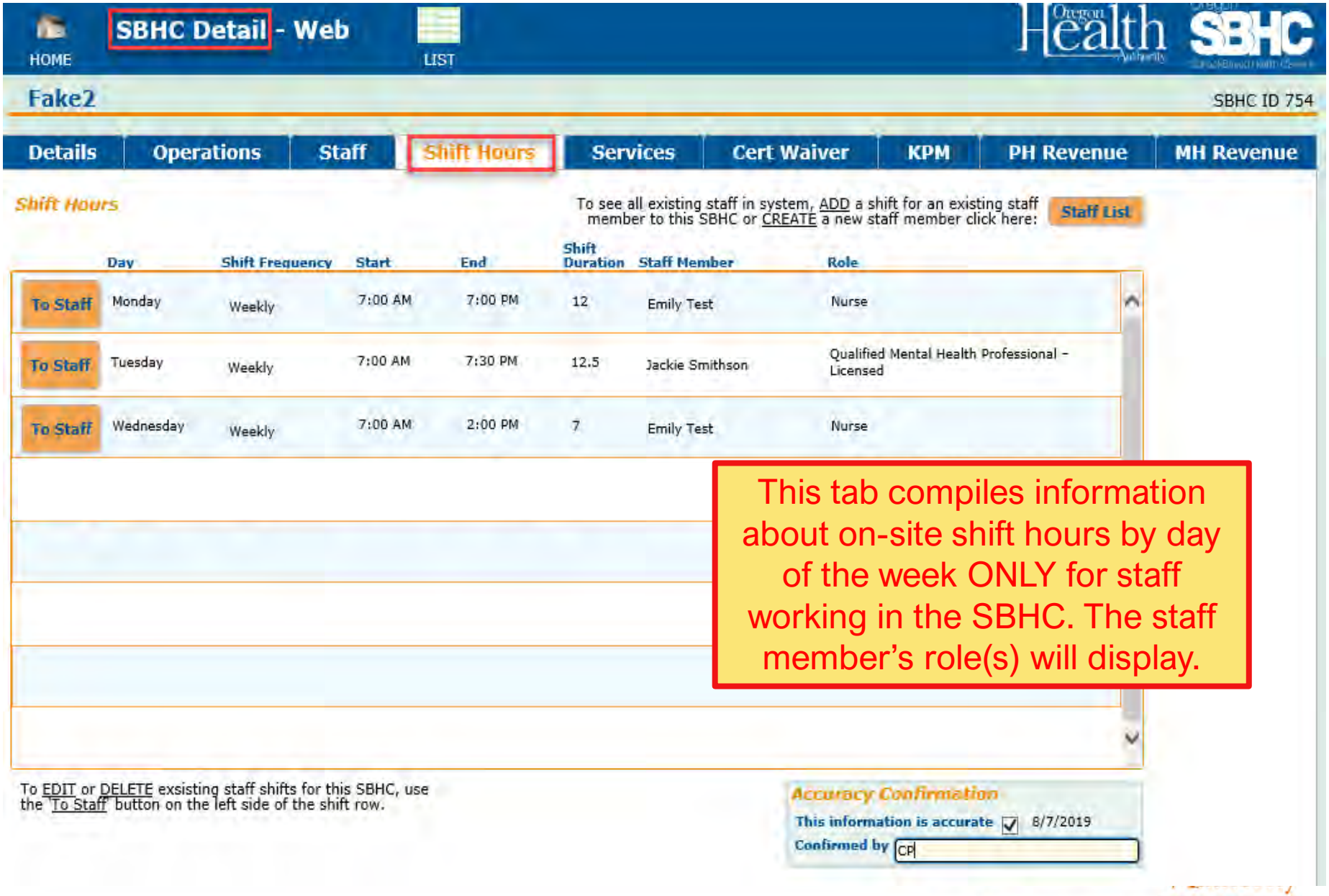
Each staff member's on-site shift hours are entered on this tab. A row must include SBHC name, day of the week, shift frequency (weekly, twice a month, etc.) and start/end time. ONLY use standard AM/PM and not military time. *The information on this tab ensures certification requirements are met for days of the week and hours by staff type/role.*

Main Staff 'tab'

This tab compiles information from all staff records associated with the SBHC. *The information ensures certification requirements are met and identifies unassigned roles.*

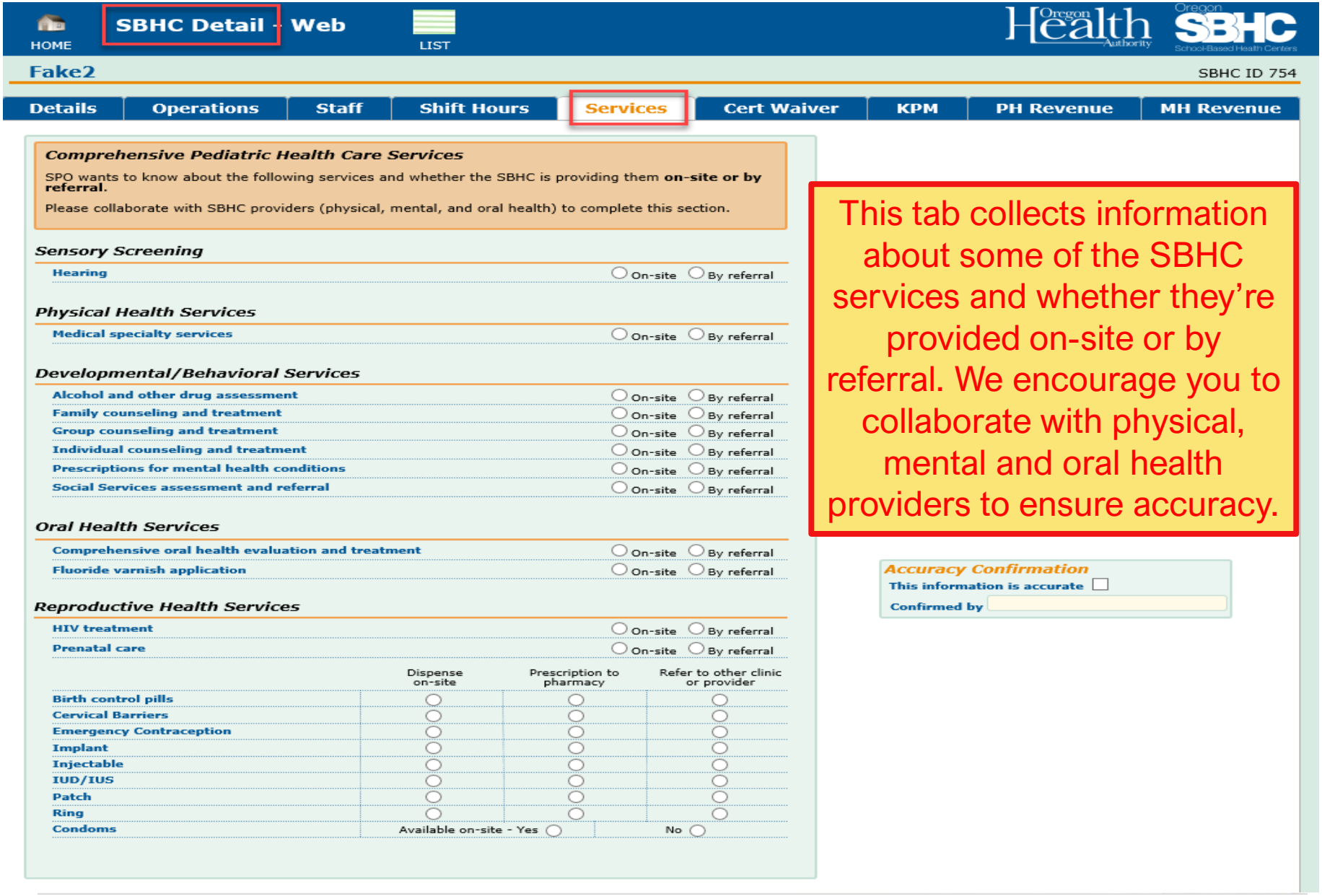


SBHC Shift Hours 'tab'



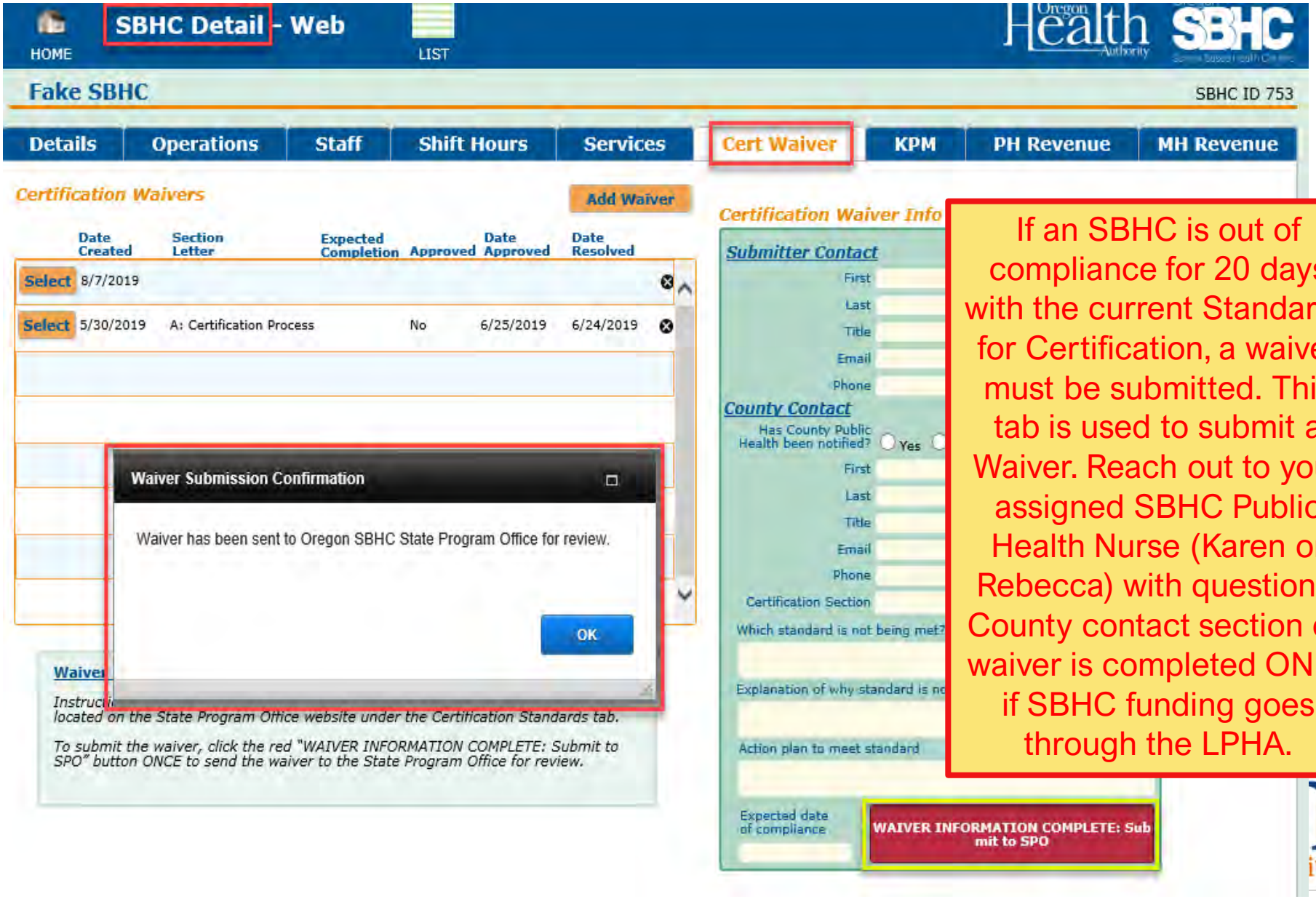
This tab compiles information about on-site shift hours by day of the week ONLY for staff working in the SBHC. The staff member's role(s) will display.

Services ‘tab’



This tab collects information about some of the SBHC services and whether they’re provided on-site or by referral. We encourage you to collaborate with physical, mental and oral health providers to ensure accuracy.

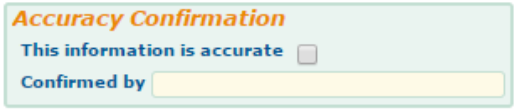
Cert Waiver ‘tab’



If an SBHC is out of compliance for 20 days with the current Standards for Certification, a waiver must be submitted. This tab is used to submit a Waiver. Reach out to your assigned SBHC Public Health Nurse (Karen or Rebecca) with questions. County contact section on waiver is completed ONLY if SBHC funding goes through the LPHA.

Helpful Hints

- The OP User's Guide can be found on the Certification Standards page as well as the Data Requirements page of our website at: 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 is automatically saved.
- Check all the accuracy confirmation boxes.



- Staff information (roles, credentials, shift hours, languages spoken) should be double-checked for accuracy

Oregon SBHC School-Based Health Centers

Oregon Health Authority

Key Performance Measures (KPMs)

- SBHCs are committed to high-quality, age appropriate, accessible health care for school-age children.
- Each SBHC conducts an annual chart audit to assess their progress in meeting the measures. Results of audit entered in the Operational Profile every year.
- Due to COVID-19, the statewide KPM benchmarks for 2020-21 and 2021-22 have been removed.

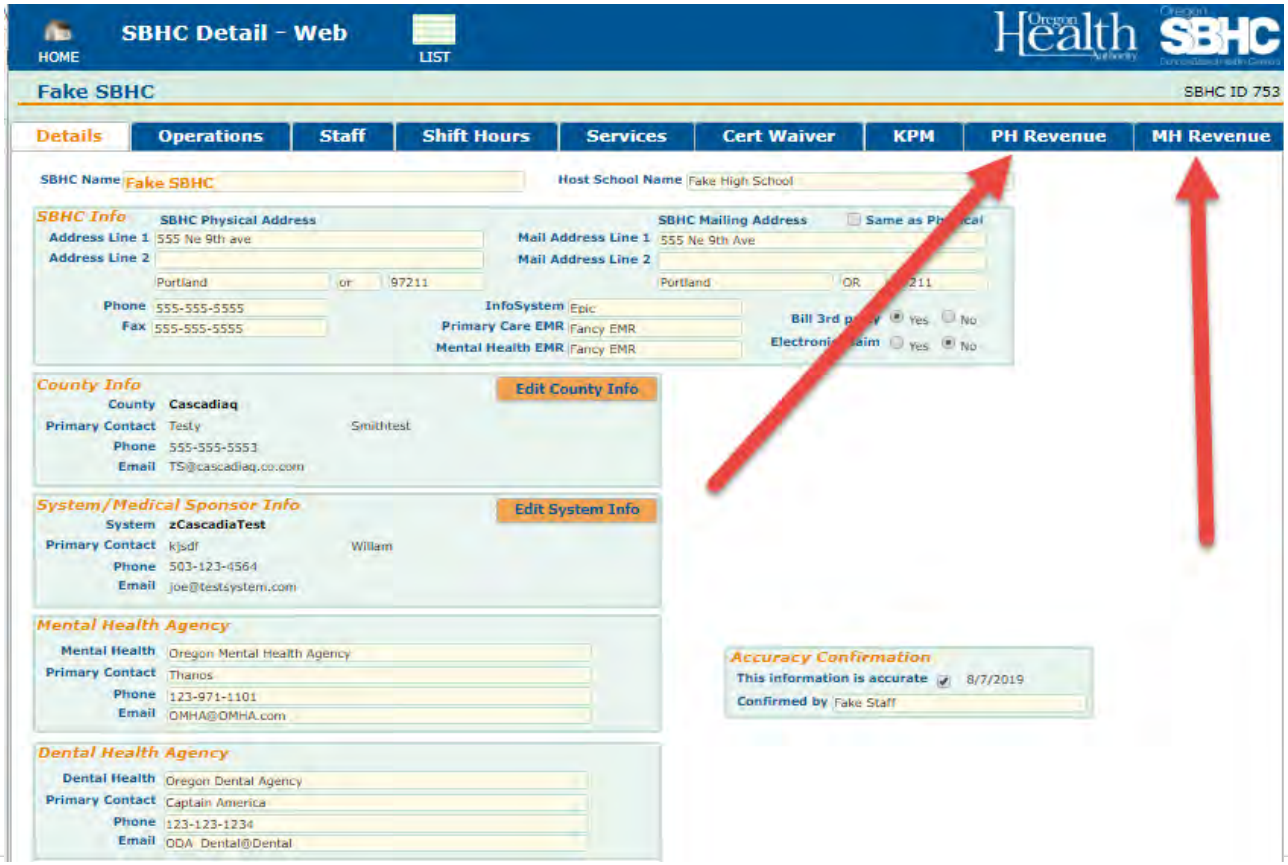
There is a separate presentation focusing only on KPMs and the annual chart audit requirements.

Oregon SBHC School-Based Health Centers

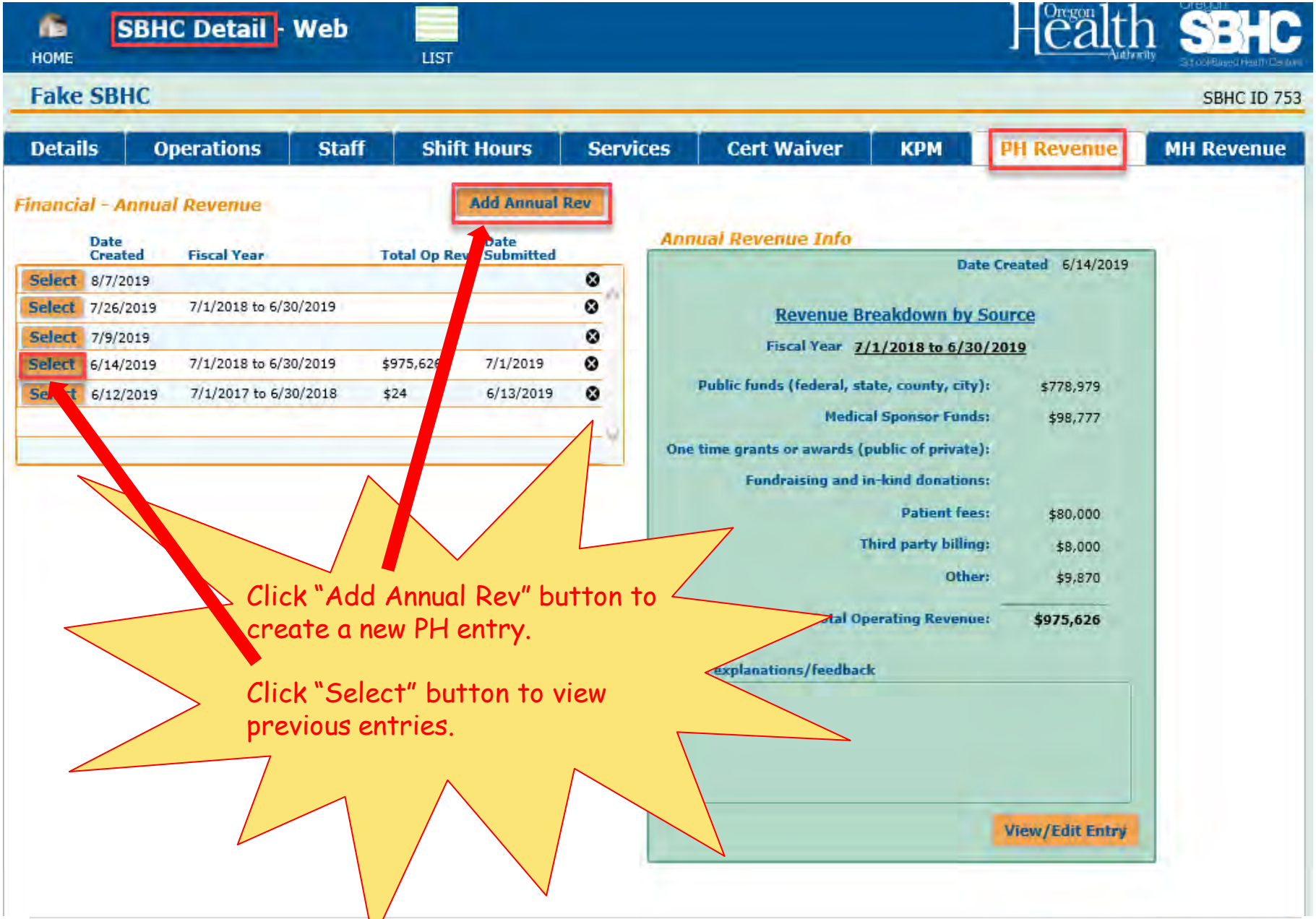
Oregon Health Authority

Financial Revenue Tabs

- Primary care and dental services (PH Revenue tab)
- Mental health services (MH Revenue tab)
- Separate login for an outside Mental Health agency to submit their Financial entry (send an Email to SPO for login)
- Entry is for the *previous year* (July 1, 2020 – June 30, 2021)



PH Revenue Tab



PH Revenue Detail 'tabs'

PH Revenue Detail 'tabs'

PH Revenue Detail 'tabs'

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.

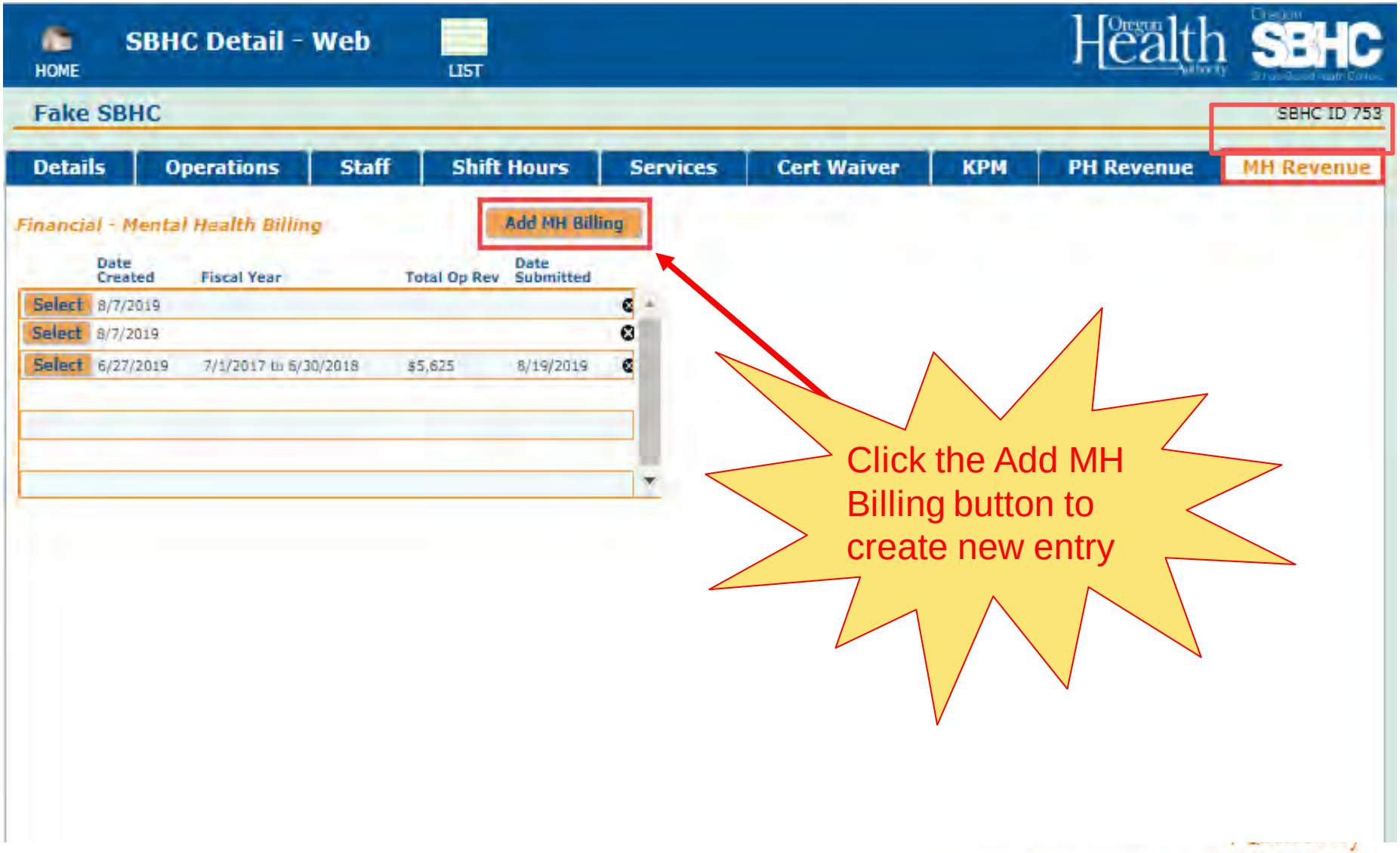
  Email request for Login and Password: SBHC.PROGRAM@DHSOHA.STATE.OR.US. Please provide the name of your agency and SBHC(s) in the email request.

- 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.

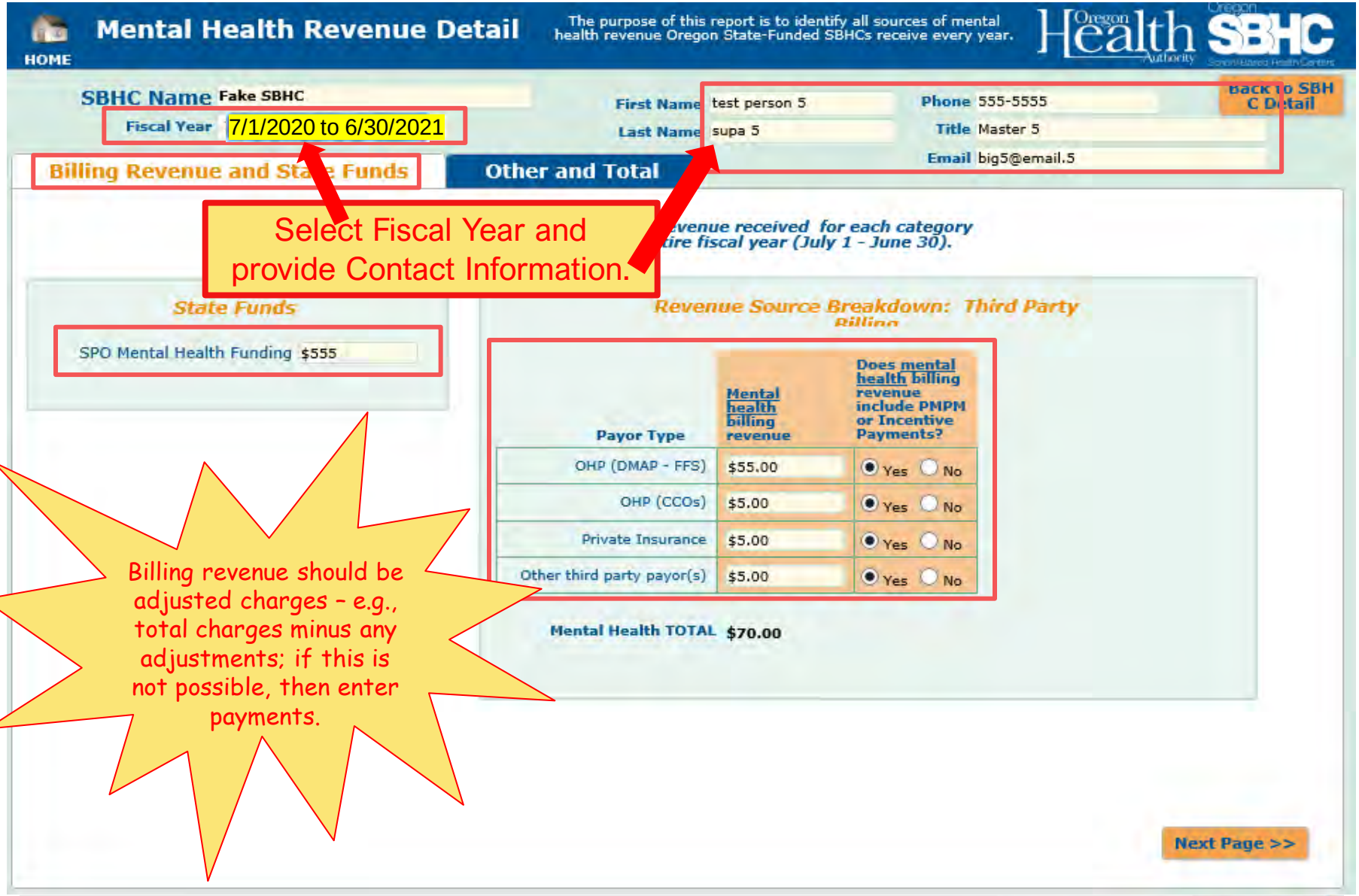
Oregon SBHC School-Based Health Centers

Oregon Health Authority

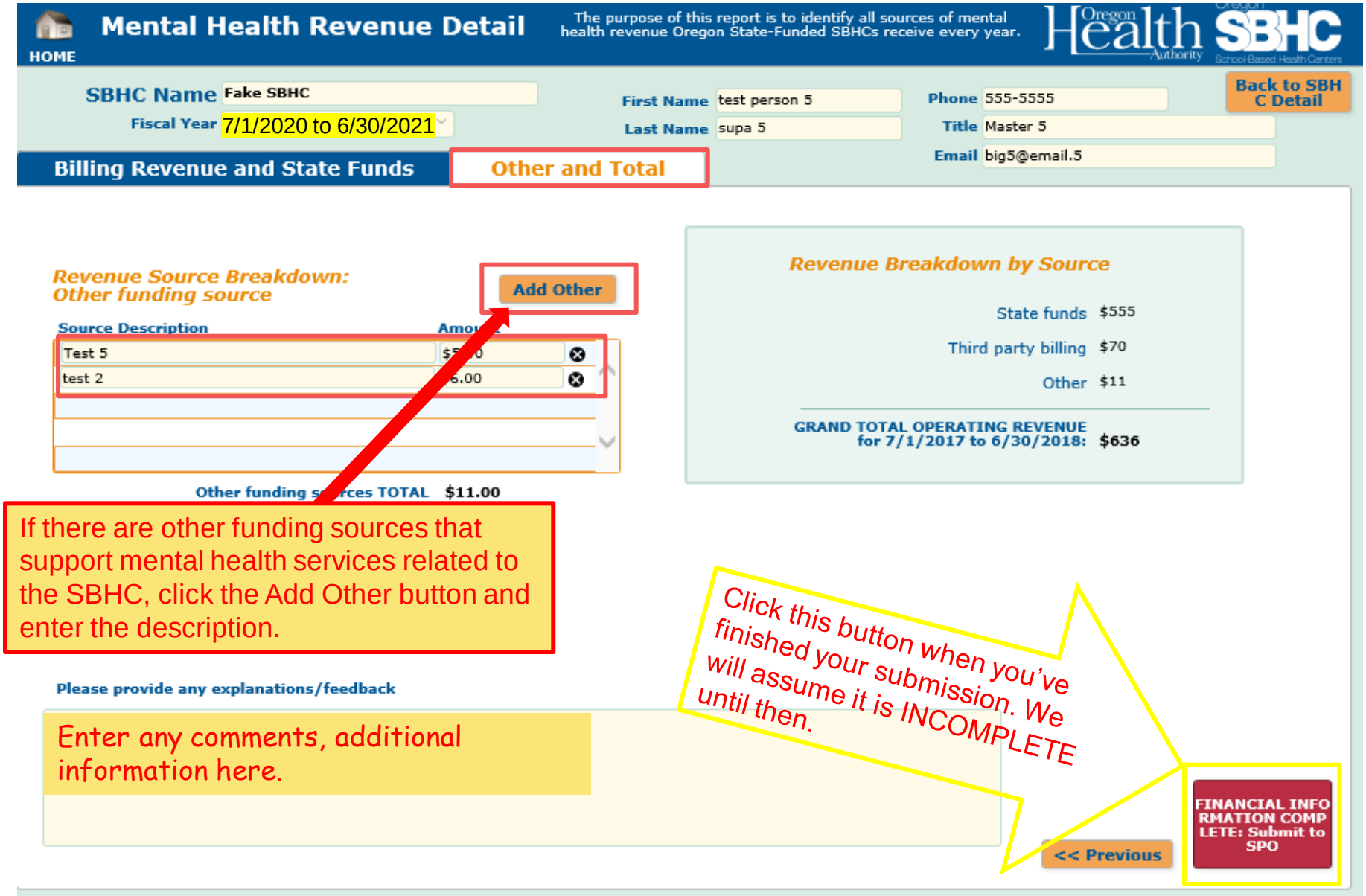
MH Revenue Tab



MH Revenue Detail tabs

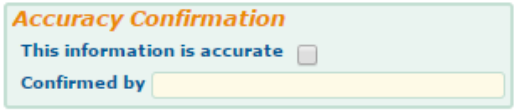


MH Revenue Detail tabs



Helpful Hints (again!)

- 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 is automatically saved.
- Check all the accuracy confirmation boxes.



- Staff information (roles, credentials, shift hours, off site addresses) should be double-checked for accuracy
- Send Loretta the KPM audit process document before performing the chart audit.

Oregon SBHC School-Based Health Centers

Oregon Health Authority

Operational Profile User's Guide

- Step-by-step instructions for making changes in the Operational Profile

- The OP User's Guide can be found on the Certification Standards page as well as the Data Requirements page of our website at: www.healthoregon.org/sbhc

Oregon SBHC School-Based Health Centers

Oregon Health Authority

SPO Operational Profile Audit Process

- The profile audit begins after the October 1st deadline (this year's deadline is 12/1/2021)

  What we will review:

  - All the required areas are complete and confirmed
    - » Details, Operations, Hours of Operation, 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
  - Financial entry is complete

- Sites will be notified if they are out of compliance

Oregon SBHC School-Based Health Centers

Oregon Health Authority

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

Oregon SBHC School-Based Health Centers

Oregon Health Authority