

## Re-Certification Process for CERTIFIED SBHCs

\*More information can be found on the [Data Requirements](http://www.healthoregon.org/sbhc) page at [www.healthoregon.org/sbhc](http://www.healthoregon.org/sbhc).

\*\*More information can be found on the [Certification Standards](http://www.healthoregon.org/sbhc) page at [www.healthoregon.org/sbhc](http://www.healthoregon.org/sbhc).

\*\*\*Archived meetings can be found on the [Coordinators Meetings](http://www.healthoregon.org/sbhc) page at [www.healthoregon.org/sbhc](http://www.healthoregon.org/sbhc).

### ANNUAL CERTIFICATION REQUIREMENTS

*To remain certified, SBHCs must stay in compliance per Standards for Certification. The list below outlines reoccurring due dates and deliverables, as required by the Standards for Certification and the SBHC State Program Office (SPO).*

- JULY 15:**
- Visit/encounter data submission from prior school year\*
  - Mental Health Expansion Grant annual report (covers July -June), if applicable

- OCTOBER 1:**
- Update the Online SBHC Operational Profile for the current school year. More info in the Operational Profile Users Guide\*\*
    - Includes entire profile (Details, Operations, Hours of Operation, Staff, Shift Hours, Services)
    - Includes Annual Operating Revenue Information\*

- OCTOBER:**
- Coordinator meeting (historically in-person in Portland or Central Oregon) \*\*\*

- WINTER:**
- Coordinator Meeting via webinar\*\*\*

- JANUARY 31:**
- Visit/encounter data mid-year submission for current school year\*

- SPRING:**
- Coordinator meeting via webinar\*\*\*
  - Each biennium, existing contracting agreements are reviewed by SPO with LPHA when contracts are renewed e.g., Spring 2027, Spring 2029

- ONGOING:**
- Update Operational Profile as changes occur (e.g., staffing, operating hours, contact information or other updates). More info in the Operational Profile Users Guide\*\*

# CERTIFICATION VERIFICATION SITE VISIT REQUIREMENTS

After the initial on-site verification review, the SPO will conduct an on-site verification review (site visit) every two years for a representative sample of certified SBHC in each SBHC system

## STEP 1: SPO will schedule Certification Verification Site Visit

SPO will contact LPHA and applicant (if not the LPHA) or tribe to schedule site visit.

## STEP 2: Fulfill Pre-site Visit Requirements

- ☐ Review and update, if needed, the Online SBHC Operational Profile **no less than two weeks prior to site visit** (login information provided by SPO)\*\*  
The following Operational Profile tabs must be reviewed and updated, if needed: Details, Operations, Hours of Operation, Staff, Shift Hours, Services  
Instructions to complete Operational Profile include:
  - Operational Profile Users Guide\*\*
  - SBHC Role Descriptions are listed in the Standards for Certification\*\*
- ☐ Email required materials to assigned Public Health Nurse\*\* **no less than two weeks prior to site visit. This may include, but is not limited to:**
  - ☐ Required SBHC policies and procedures
  - ☐ Working alone policy, if applicable.
  - ☐ Lab policies
  - ☐ Documentation of blood borne pathogen training for each employee with occupational exposure
  - ☐ Documentation of privacy training for all SBHC workforce (physical, mental health, dental health)
  - ☐ ALERT IIS vaccine eligibility by age report
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## STEP 3: Prepare for Site Visit

- ☐ Review Standards for Certification\*\*
- ☐ Review and fill out the Certification Verification Review Tool\*\* for areas that will be assessed during the site visit
- ☐ Review and update, if needed, the Online SBHC Operational Profile **no less than two weeks prior to site visit**

## STEP 4: Day of Site Visit Requirements

SPO will conduct the following activities:

- Review of documents, policies and procedures, and records
- Review of electronic medical record systems, review of electronic health records systems, and review of practice management systems
- Review of data reports from electronic systems or other patient registry and tracking systems
- Interviews with practice management, clinical and administrative staff. This includes interviews with school staff including office, administration, and school nurse, if available.
  - On-site observation of practice staff with school-aged patients during the site visit may occur during client intake, clinic flow, sick visits, well visits, etc. Prearranged scheduling of well visits for the reviewer to observe is not required or requested, and
  - On-site observation of patient environment and physical environment during business hours

Applicant participates by having Site Coordinator on site, inviting partners and participating in exit interview

## STEP 5: Site Visit Report

SPO will send written site visit report within two weeks of site visit

- ☐ Complete any indicated Action Items by listed deadlines

## STEP 6: Congratulations – Your SBHC is CERTIFIED!

You can get this document in other languages, large print, braille, or a format you prefer free of charge. Contact the School-Based Health Center (SBHC) Program at [sbhc.program@odhsoha.oregon.gov](mailto:sbhc.program@odhsoha.oregon.gov) or 503-798-2852 (voice). We accept all relay calls.