SBHC Operational Profile Training

August 2025

Agenda

- ✓ What is the Operational Profile
- ✓ SBHC Coordinator role
- ✓ What, How & Where
- ✓ Database structure
- ✓ Staff – Who to include/Roles
- ✓ SPO Audit Process

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What is the Operational Profile and what are the Coordinator's responsibilities?

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What is the Operational Profile (OP)?

A web-based FileMaker database that collects detailed information about each SBHC

- Staff contact info, roles, credentials, and shift hours
- Operational hours for primary care and MH/BH services
- Key Performance Measure audit results
- Financial revenue entries

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Snapshot of the OP

When must the Coordinator submit and update the OP?

Initial site certification

Annual update by October 1st

Prior to recertification site visit

As staffing changes occur through out the year

What, How & Where

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What is the Purpose of the OP?

Collect data that allows our program to ensure every SBHC is meeting the Standards for Certification

- Certification-required Staff roles
- In-person operational hours
- Key Performance Measures
- Financial/Revenue information

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How Is OP Data Used?

- Enables SPO to answer questions from legislators or partners
  - PCPCH Status
  - Number of sites with Youth Advisory Councils
- Provides a snapshot of the SBHC
  - Population served outside of the host school
  - Staffing beyond certification requirements
  - Specific services provided (contraception, etc.)

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How to Access the OP

- Login and password required to access the OP
- Assigned by SPO
- One login per medical sponsor
- Separate login for outside MH agency to submit their financial entry
- Questions about login or access:

SBHC.Program@odhsoha.oregon.gov

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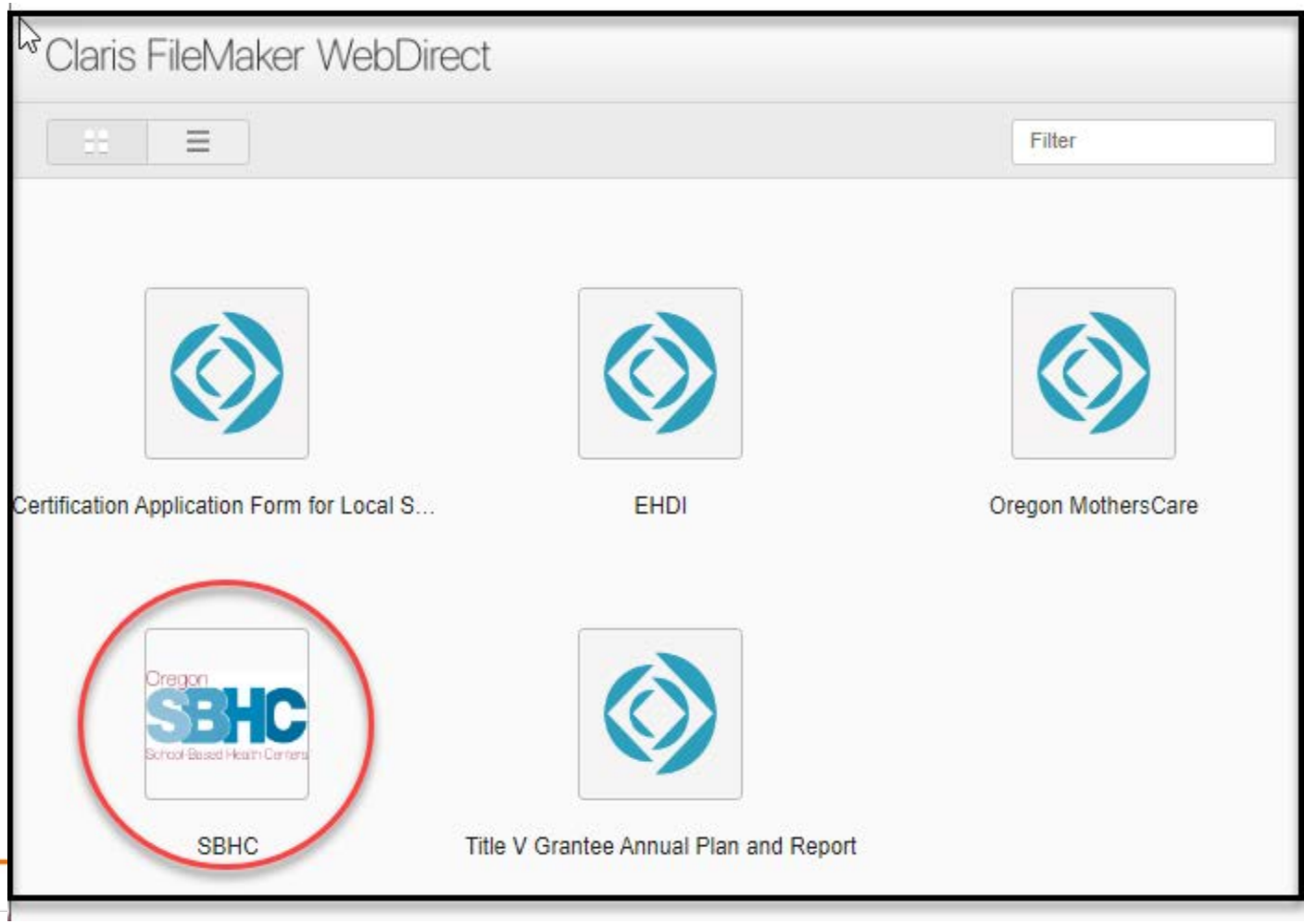
Where Is the OP?

Gain access to the **login** page using Chrome, Safari or Edge:
http://mchweb.oha.state.or.us/fmi/webd



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OP Information Posted Online

SPO Website

Operational Profile

The Operational Profile is a web-based database where SBHCs enter information that is, in part, used to demonstrate compliance with the Standards for Certification. Information collected in the database includes staffing roles and shifts, hours of operation, services provided on-site or by referral, waiver submissions for out of compliance issues, Key Performance Measures (KPM) and Financial - Annual Revenue entries for both Primary Care and Mental Health services. Each SBHC Coordinator is responsible for the managing and keeping up to date the content in their Operational Profile. The Operational Profile must be filled out before a site's initial certification site visit, updated yearly by October 1st, as changes occur throughout the year, and prior to the verification site visit.

Access and login information is issued and maintained by the SPO. For instructions and background information about the Operational Profile, please reference both the User's Guide and the Training presentation.

SBHC Annual Operating Revenue Information

The billing/revenue/funding data is collected via a web-based template. It is a retrospective data report for the previous service/school year. Some of the data collected includes revenue from registration fees, third party payors such as Medicaid and Private Insurance. The template also collects other public and private funding that is used to operate the SBHC. Submission of the SBHC Annual Operating Revenue Report must occur no later than October 1st for the preceding service year (July 1-June 30) into your sites Operational Profile. For instructions, please reference the Operational Profile User's Guide and this Financial - Annual Revenue presentation.

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More Posted OP Information

Key Performance Measures (KPMs)

Each certified SBHC is required to report on two Core KPMs, as well as one of eight Optional KPMs. As part of the KPMs process, SBHCs are required annually to perform a random chart audit of 20% of their charts of the eligible population, with a **minimum** of 30 charts and a **maximum** of 50 charts. If the SBHC has fewer than 30 eligible charts, they should review all eligible charts. Any physical, mental or oral health visit for which the SBHC currently submits data to SPO would be eligible to be included in the chart audit, unless explicitly stated otherwise.

For background information and instructions on how to submit chart audit results, please reference this KPM presentation.

Guidance documents were created to outline the definitions and requirements for each measure:

Core KPMs:

1. Health Assessment
2. Well Visit

Optional KPMs:

1. Adolescent Immunization
2. Adolescent Teen Immunization Series
3. Chlamydia Screening
4. Depression Screening
5. Flu Immunization
6. HPV Immunization
7. Nutrition Counseling
8. Substance Use Screening

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KPM Chart Audits

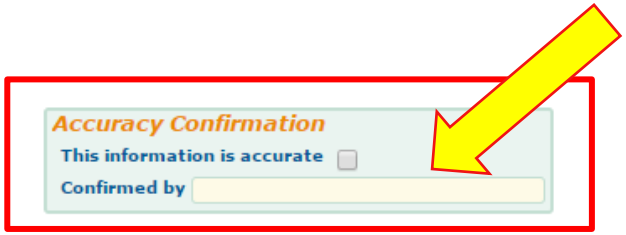
Each SBHC is required to submit a brief description of their chart audit process as well as a chart audit tracking sheet. The SPO created a sample tracking sheet that SBHCs may use: KPM Blank Chart Audit Spreadsheet. For an example of how the data should be entered into the chart audit spreadsheet, review this KPM Sample Chart Audit Fake Data.

KPM Submission Timeline

Submission of KPMs data must occur no later than **October 1st for the preceding service year** (July 1 - June 30) into your site's Operational Profile. For instructions, please reference the Operational Profile User's Guide.

Helpful Hints about OP

- Changes are automatically updated, there is no Save button.
- Do not use your internet browser 'back' button. Use the buttons in the database.
- When you're updating the database, be sure to scroll to the bottom of the page to see if you need to check an Accuracy Confirmation box.



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OP database structure

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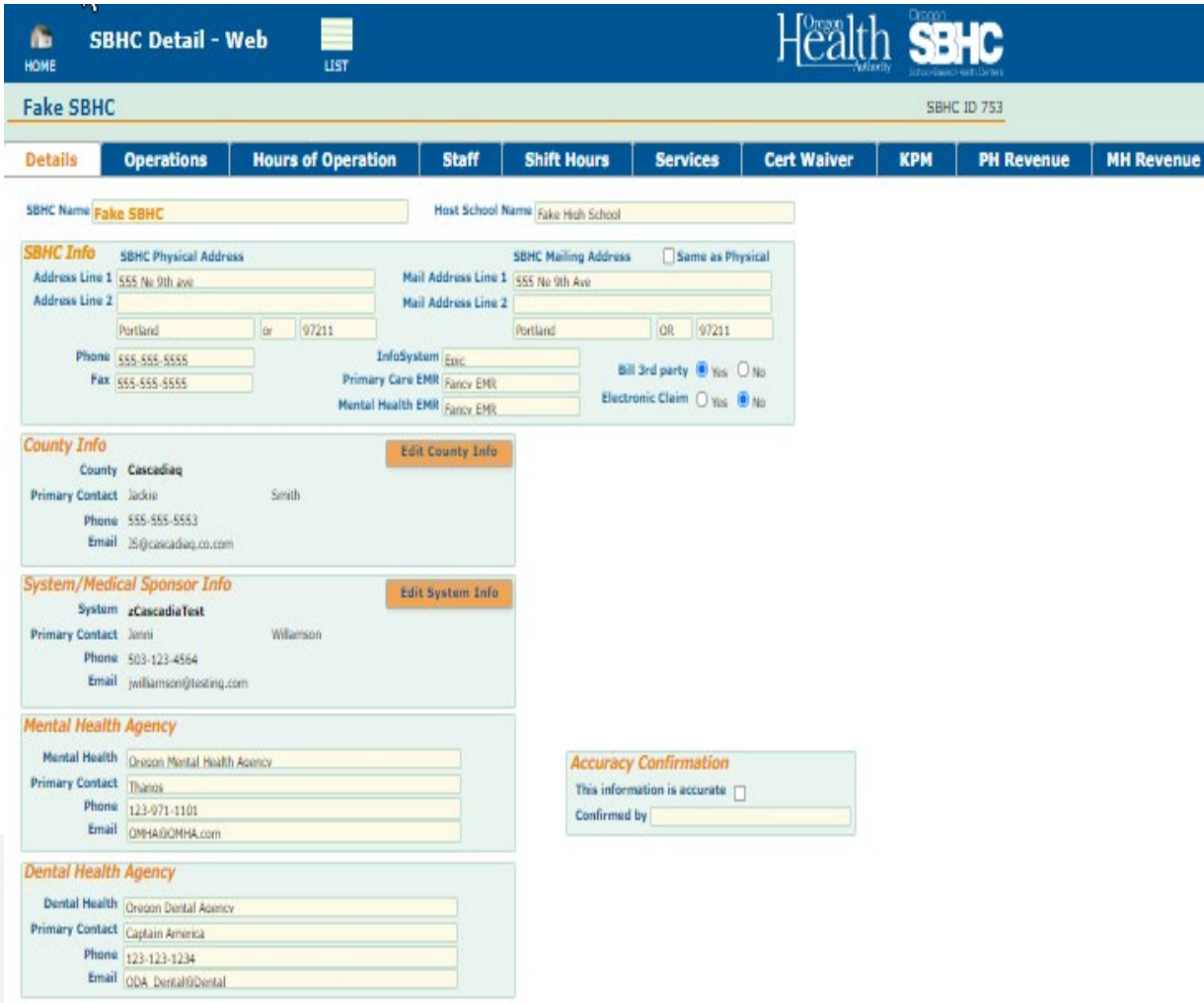
Structure

- SBHC Details
- Operations
- Hours of Operation
- Staff
- Shift Hours
- Services
- Cert Waiver
- KPMs
- Financial Revenue
  - Physical/Dental Health
  - Mental Health



Current Year vs. Previous Year

- **Details**, **operations**, **hours of operation**, **staff, shift hours and services information** reflect the current year (July 1, 2025 to June 30, 2026).

- **KPM** and **Financial/Revenue data** entries are retroactive, covering the previous year (July 1, 2024 to June 30, 2025).

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Operational Profile Tabs

- The next several slides include screenshots of each tab in the database
- 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.
- User's Guide is posted on the SPO website and is referenced on both the Certification and Data pages:

Link to the OP User's Guide

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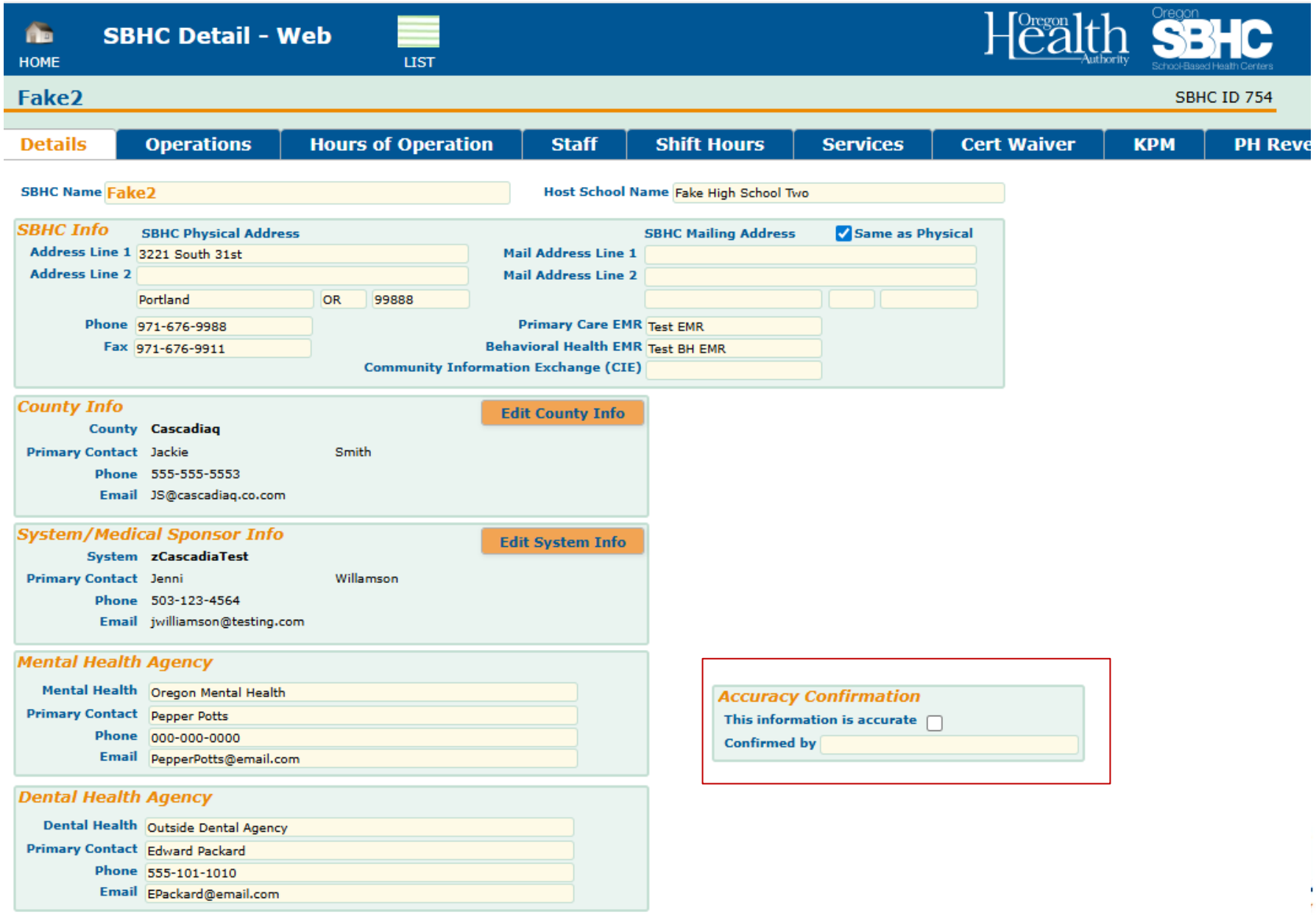
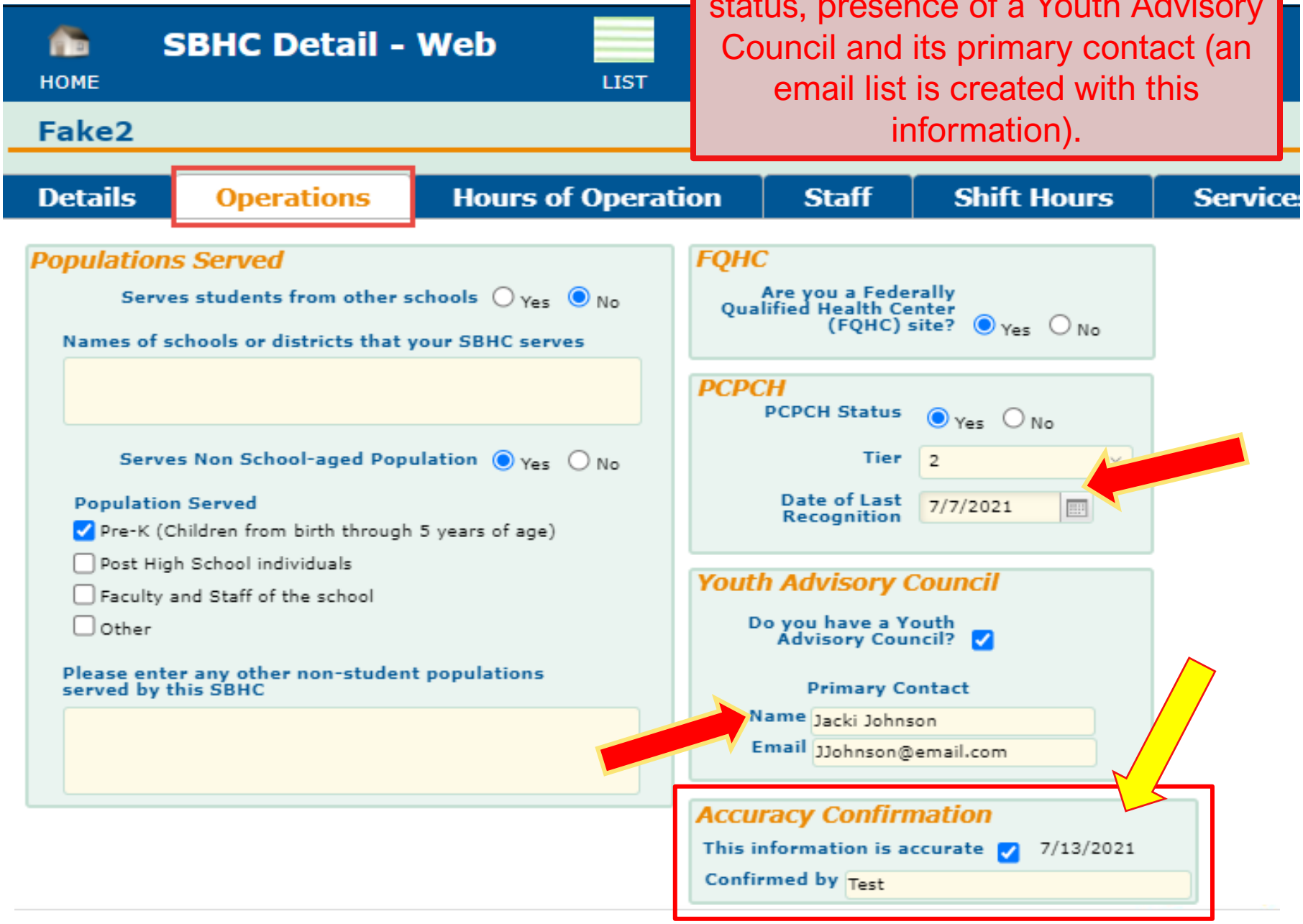
Details ‘tab’


HOME
SBHC Detail - Web
LIST
Oregon Health Authority
Oregon SBHC
School-Based Health Centers
Fake2
SBHC ID 754
Details
Operations
Hours of Operation
Staff
Shift Hours
Services
Cert Waiver
KPM
PH Reve
SBHC Name Fake2
Host School Name Fake High School Two
SBHC Info
SBHC Physical Address
Address Line 1 3221 South 31st
Address Line 2
Portland OR 99888
Phone 971-676-9988
Fax 971-676-9911
SBHC Mailing Address
Same as Physical
Mail Address Line 1
Mail Address Line 2
Primary Care EMR Test EMR
Behavioral Health EMR Test BH EMR
Community Information Exchange (CIE)
County Info
Edit County Info
County Cascadiaq
Primary Contact Jackie Smith
Phone 555-555-5553
Email JS@cascadiaq.co.com
System/Medical Sponsor Info
Edit System Info
System zCascadiaTest
Primary Contact Jenni Willamson
Phone 503-123-4564
Email jwilliamson@testing.com
Mental Health Agency
Mental Health Oregon Mental Health
Primary Contact Pepper Potts
Phone 000-000-0000
Email PepperPotts@email.com
Dental Health Agency
Dental Health Outside Dental Agency
Primary Contact Edward Packard
Phone 555-101-1010
Email EPackard@email.com
Accuracy Confirmation
This information is accurate
Confirmed by

Operations 'tab'

Update population served, PCPCH status, presence of a Youth 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 hours for IN PERSON services.
Make sure Staff shift hours cover the Hours of Operation

HOME | **SBHC Detail - Web** | LIST

Fake2

Details | Operations | **Hours of Operation** | Staff | Shift Hours | Servic

Primary Care Hours of Operation

	In-person Hours Open	In-person Hours Close	In-person Summer Hours Open	In-person Summer Hours Close
Monday	9:00 AM	1:30 PM		
Tuesday				
Wednesday	9:00 AM	1:30 PM		
Thursday	9:00 AM	3:30 PM		
Friday	9:00 AM	3:30 PM		

Open During Summer: ○ Yes ◉ No

Mental Health Hours of Operation

	In-person Hours Open	In-person Hours Close
Monday	9:00 AM	1:30 PM
Tuesday		
Wednesday	9:00 AM	1:30 PM
Thursday	9:00 AM	1:30 PM
Friday	9:00 AM	1:30 PM

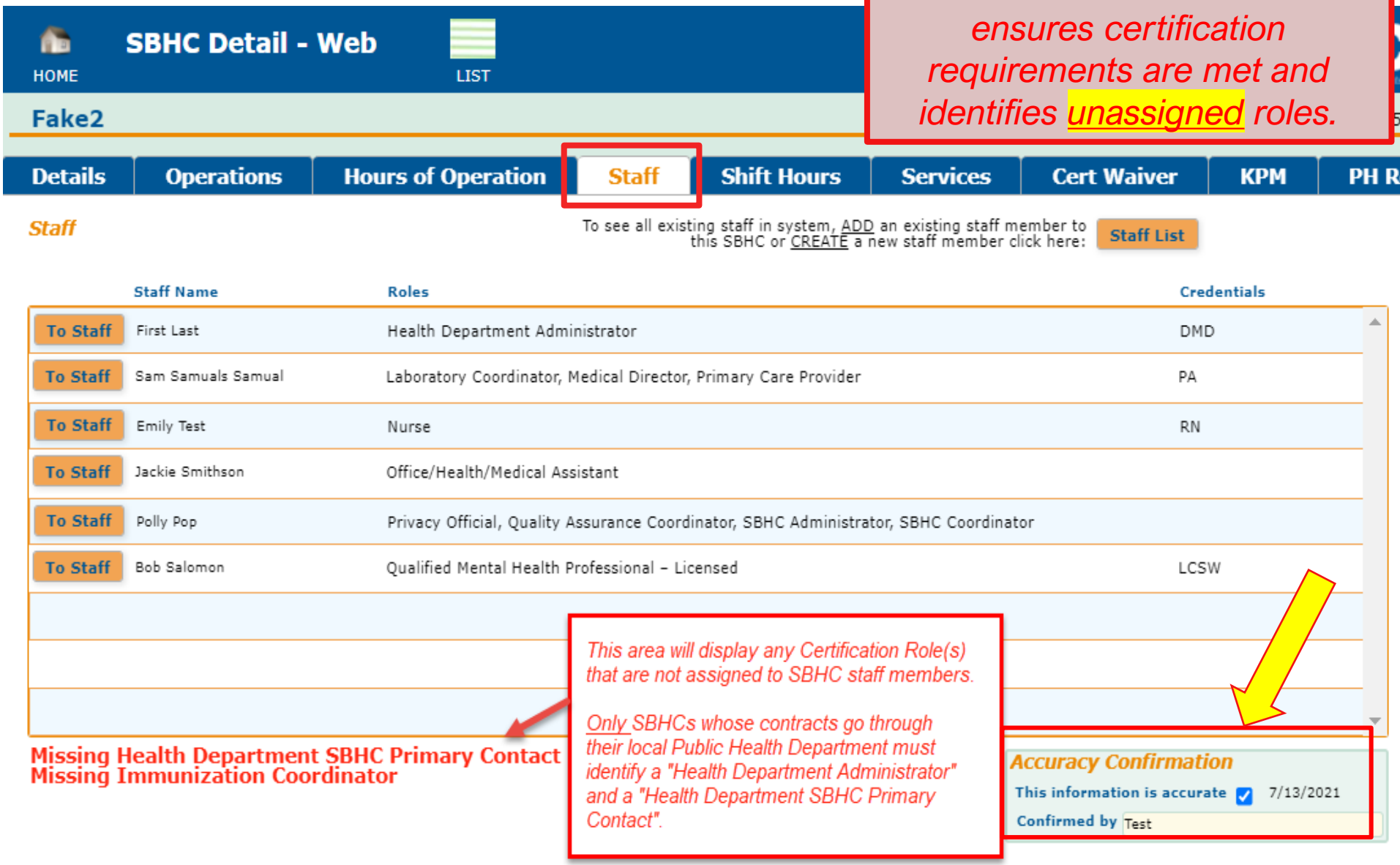
Accuracy Confirmation

This information is accurate ☑ 7/13/2021

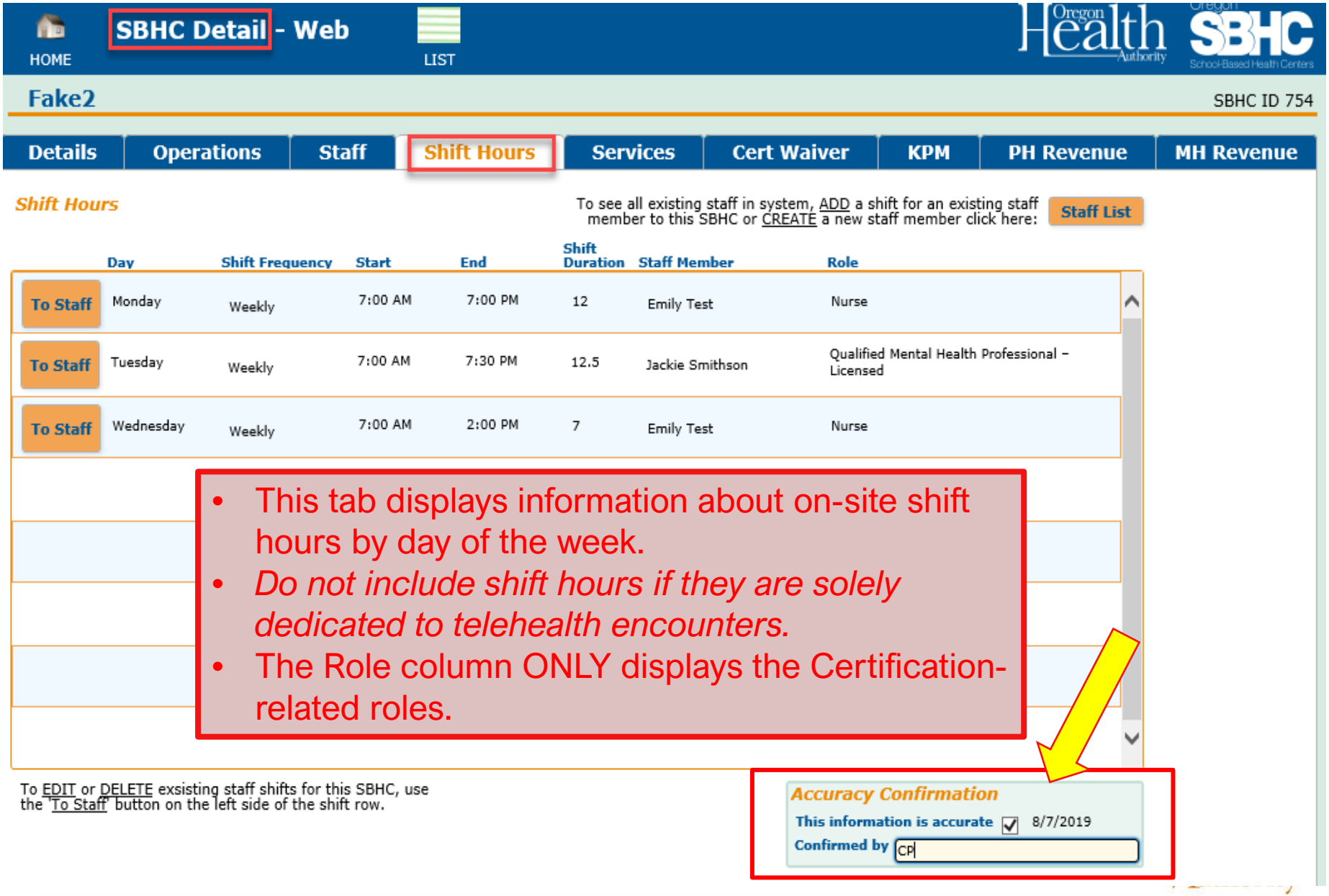
Confirmed by test

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.*



Shift Hours 'tab'



- This tab displays information about on-site shift hours by day of the week.
- *Do not include shift hours if they are solely dedicated to telehealth encounters.*
- The Role column ONLY displays the Certification-related roles.

SBHC Staff Details

- Coordinators are responsible for entering all SBHC staff into the OP which includes outside MH/BH or Dental agencies
- Update OP as staffing changes occur
  - Review OP User's Guide for steps to remove staff.
  - Contact your SBHC Public Health Nurse (Karen or Rebecca) if staffing changes bring you out of compliance with certification standards for more than 20 working days.
- Do *NOT* include VACANT staff positions

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Staff Information Collected in OP

- Email address
- Agency/Organization
- Certification and Non-Certification roles
- Credentials
- Languages spoken
- On-site shift hours when applicable

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SBHC Staff – Certification Roles

SBHCs are required to assign the following certification-required roles and document them in the OP:

- SBHC Administrator
- SBHC Coordinator
- Immunization Coordinator
- Laboratory Coordinator
- Medical Director
- Office/Health/Medical Assistant
- Primary Care Provider
- Privacy Official
- Quality Assurance Coordinator
- Health Department SBHC Primary Contact *(only for sites whose contracts go through their Local Public Health Authority)*

SBHC Certifcation Standards tab of SPO website

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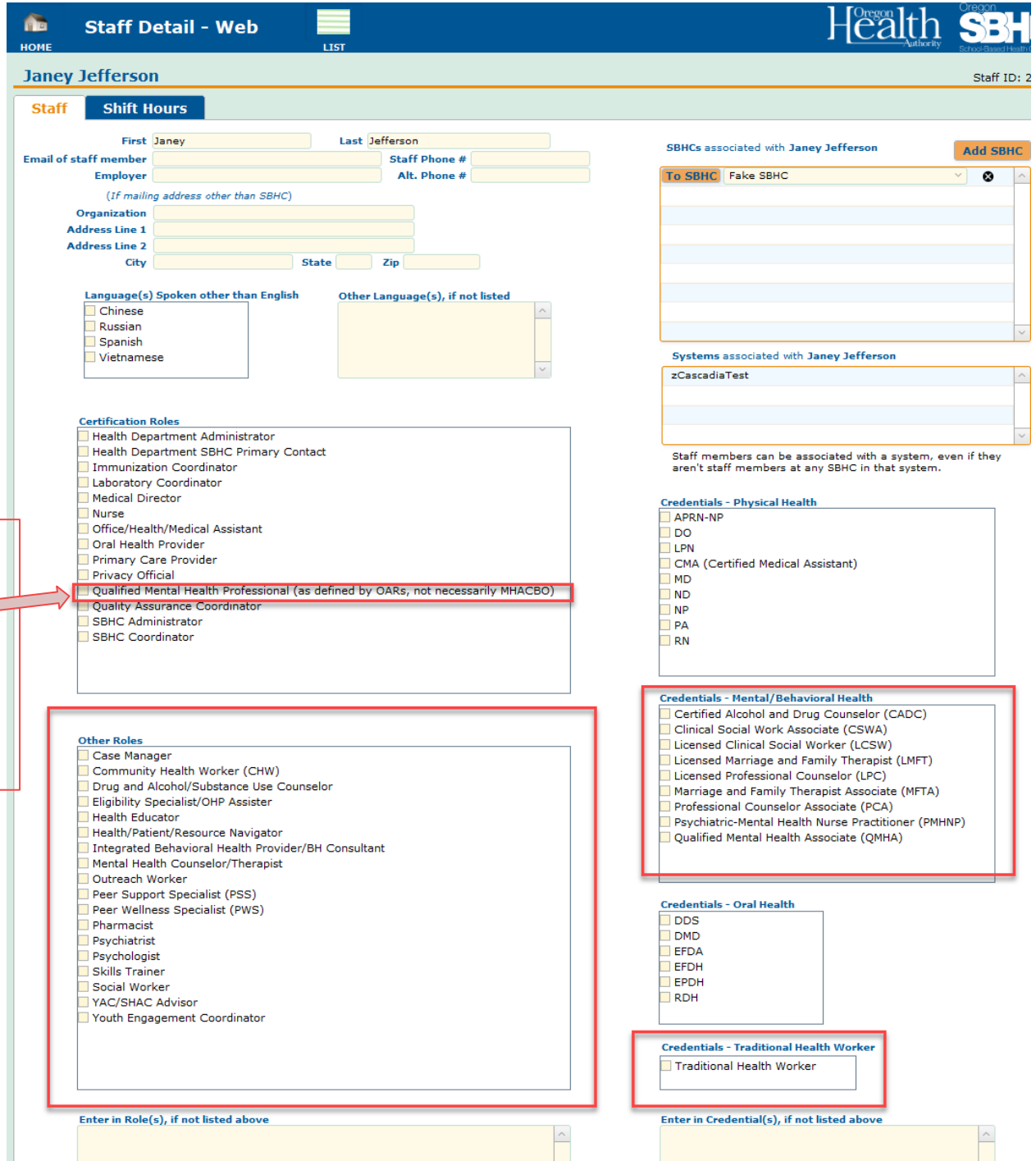
Staff Record

Qualified Mental Health Professional (QMHP) isn't a new role. It does need to meet [OAR 309-019-0125](#) Staff Qualifications and Competencies, but does not need to be registered or credentialed through [Mental Health & Addictions Certification Board of Oregon (MHACBO)](#)



SBHC Staff – Other Roles & Credentials

Certification Roles

- [ ] Health Department Administrator
- [ ] Health Department SBHC Primary Contact
- [ ] Immunization Coordinator
- [ ] Laboratory Coordinator
- [ ] Medical Director
- [ ] Nurse
- [ ] Office/Health/Medical Assistant
- [ ] Oral Health Provider
- [ ] Primary Care Provider
- [ ] Privacy Official
- [ ] Qualified Mental Health Professional (as defined by OARs, not necessarily MHACBO)
- [ ] Quality Assurance Coordinator
- [ ] SBHC Administrator
- [ ] SBHC Coordinator

If the Qualified Mental Health Professional box is checked, please check all appropriate boxes in the "Other roles" and "Credentials" sections.

Other Roles

- [ ] Case Manager
- [ ] Community Health Worker (CHW)
- [ ] Drug and Alcohol/Substance Use Counselor
- [ ] Eligibility Specialist/OHP Assister
- [ ] Health Educator
- [ ] Health/Patient/Resource Navigator
- [ ] Integrated Behavioral Health Provider/BH Consultant
- [ ] Mental Health Counselor/Therapist
- [ ] Outreach Worker
- [ ] Peer Support Specialist (PSS)
- [ ] Peer Wellness Specialist (PWS)
- [ ] Pharmacist
- [ ] Psychiatrist
- [ ] Psychologist
- [ ] Skills Trainer
- [ ] Social Worker
- [ ] YAC/SHAC Advisor
- [ ] Youth Engagement Coordinator

If the Traditional Health Worker credential box is checked, the staff should be certified with OHA and a corresponding role should be checked in the "Other Roles" section (CHW, PSS, PWS)

Credentials - Physical Health

- [ ] APRN-NP
- [ ] DO
- [ ] LPN
- [ ] CMA (Certified Medical Assistant)
- [ ] MD
- [ ] ND
- [ ] NP
- [ ] PA
- [ ] RN

Credentials - Mental/Behavioral Health

- [ ] Certified Alcohol and Drug Counselor (CADC)
- [ ] Clinical Social Work Associate (CSWA)
- [ ] Licensed Clinical Social Worker (LCSW)
- [ ] Licensed Marriage and Family Therapist (LMFT)
- [ ] Licensed Professional Counselor (LPC)
- [ ] Marriage and Family Therapist Associate (MFTA)
- [ ] Professional Counselor Associate (PCA)
- [ ] Psychiatric-Mental Health Nurse Practitioner (PMHNP)
- [ ] Qualified Mental Health Associate (QMHA)

Credentials - Oral Health

- [ ] DDS
- [ ] DMD
- [ ] EFDA
- [ ] EFDH
- [ ] EPDH
- [ ] RDH

Credentials - Traditional Health Worker

- [ ] Traditional Health Worker

Which Staff Need Shift Hours in the OP?

ALL staff who work on-site, including individuals who:

- Work hours that are not used to meet certification requirements
- Don't work a standard schedule each week (i.e., monthly, bi-weekly)

Do Not include shift hours if only telehealth services are provided during that time

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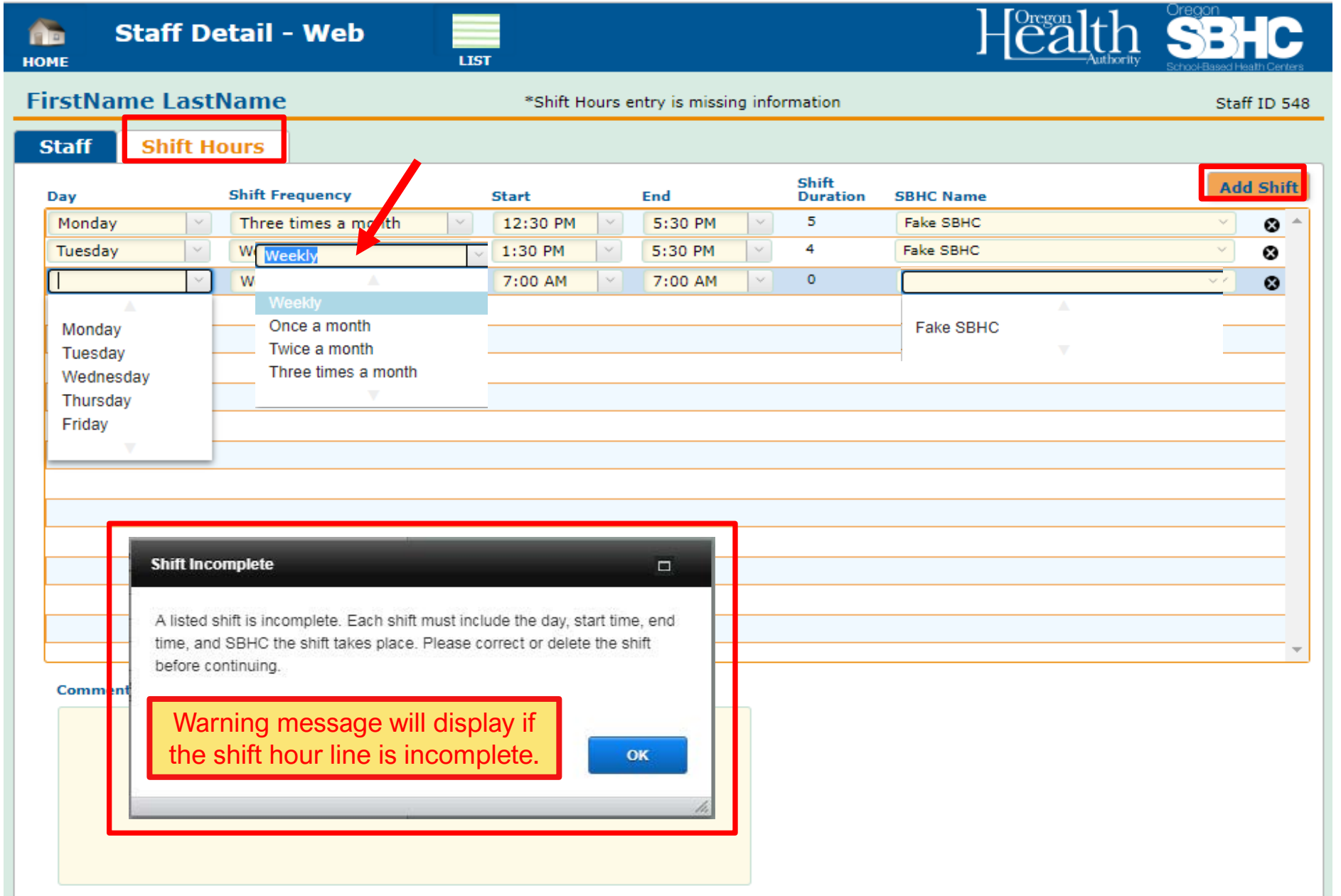
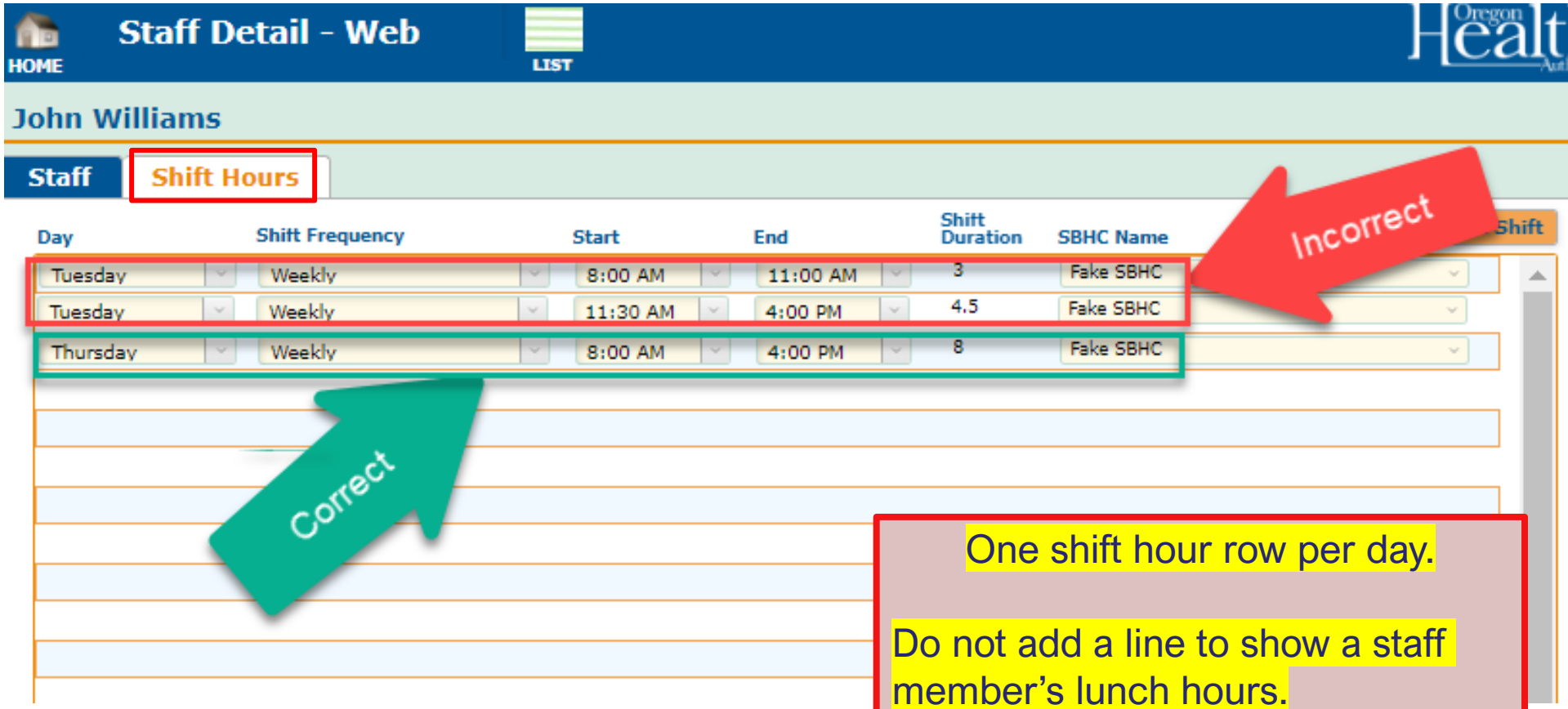
Staff Detail Shift Hours ‘tab’



Staff Detail Shift Hours – One Row/Day/SBHC



One shift hour row per day.

Do not add a line to show a staff member's lunch hours.

Information on this tab ensures the SBHC meets certification requirements for days of the week and hours by staff type/role.

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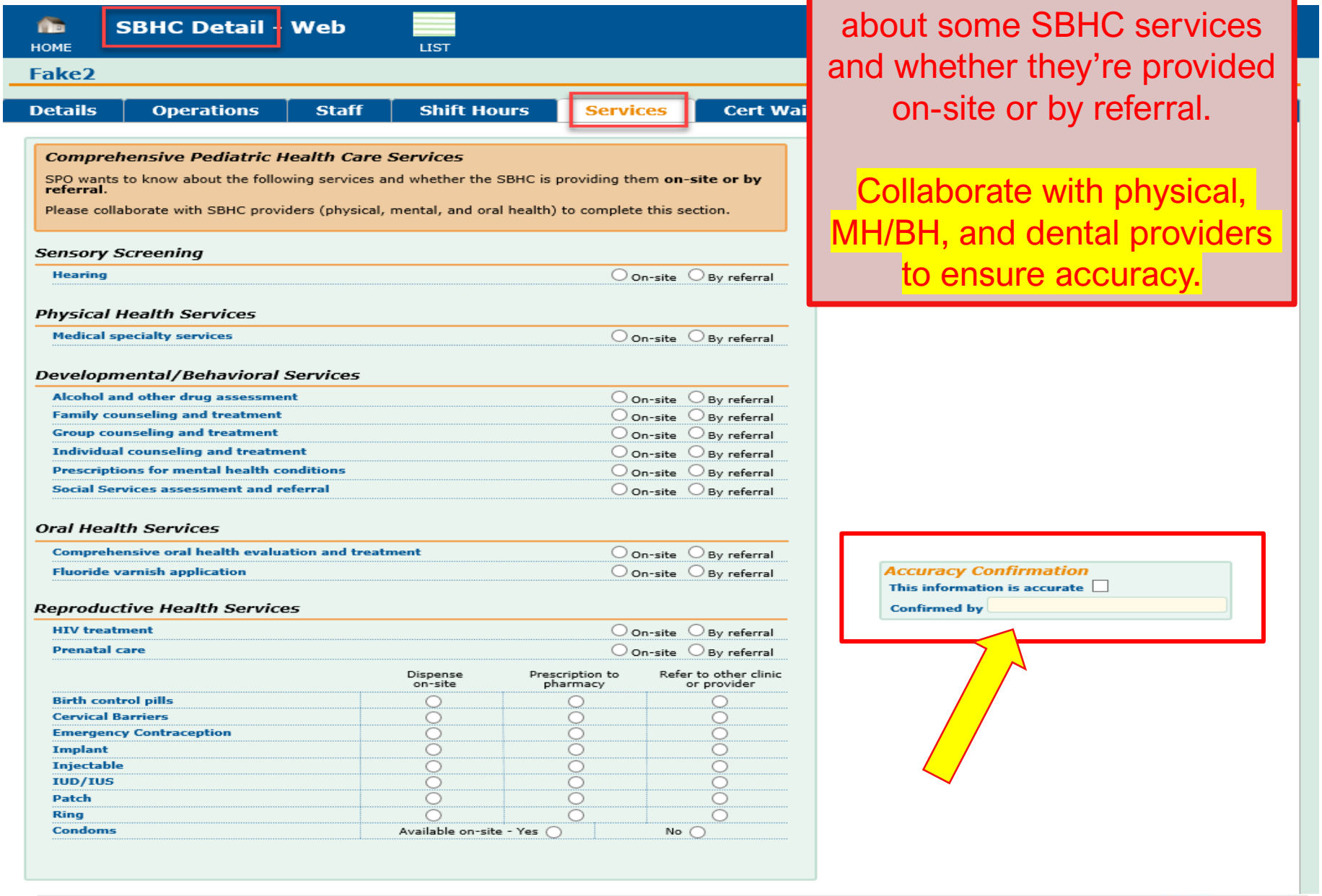
Services 'tab'



This tab collects information about some SBHC services and whether they're provided on-site or by referral.

Collaborate with physical, MH/BH, and dental providers to ensure accuracy.

Waiver Entry if SBHC is Out of Compliance

- SBHC must submit a wavier in the OP when it is out of compliance with the Standards for Certification for 20 business days.
- The Waiver entry in the OP must include:
  - Which Standard is not being met
  - Why it is not being met
  - Plan to come into compliance
- Contact your assigned SBHC Public Health Nurse with questions.

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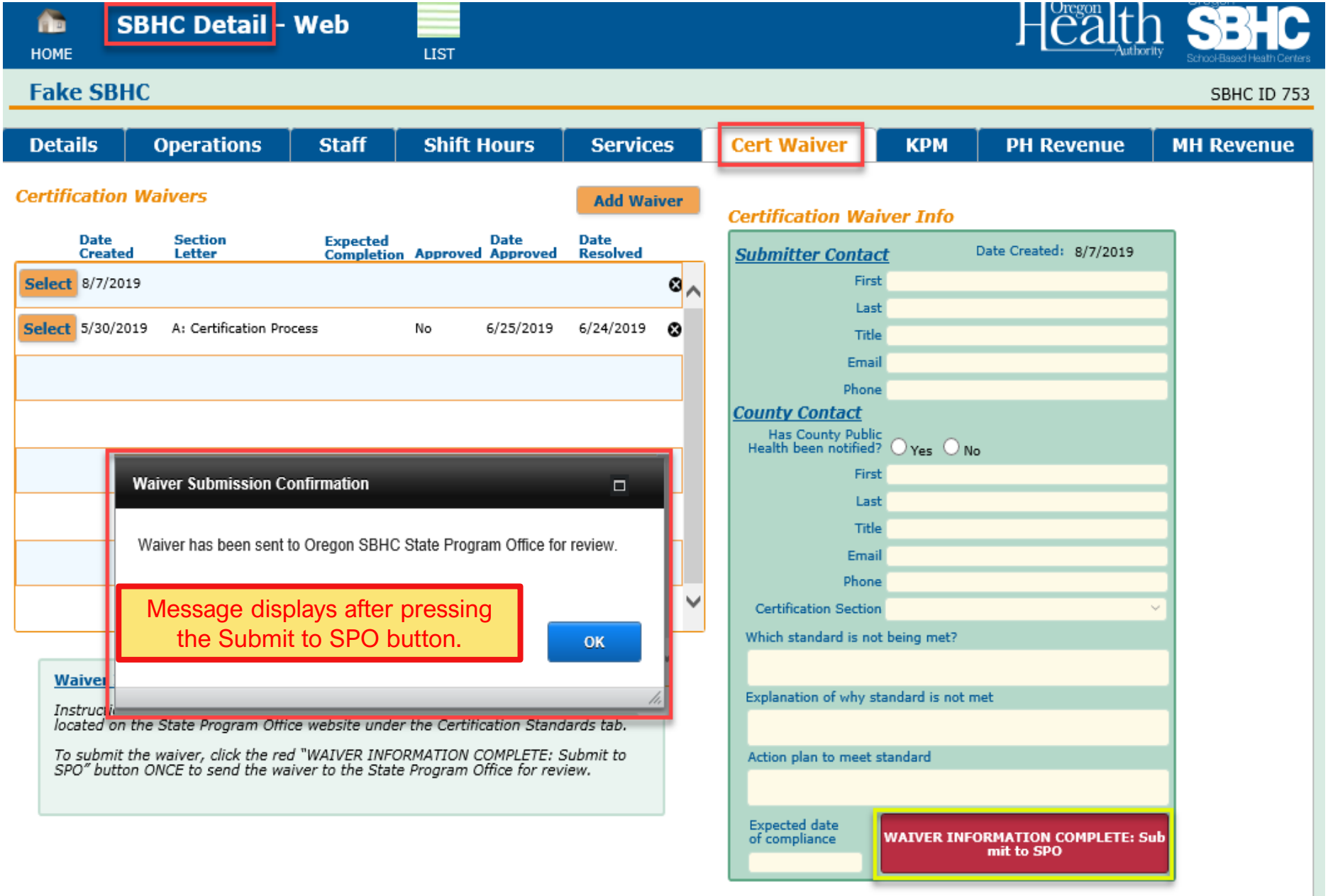
Cert Waiver ‘tab’



Key Performance Measures

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Key Performance Measures (KPM)

- KPM audit is a quality assurance/ improvement process that includes a chart review of a subset of school-age SBHC clients (5 - 21 years) who received services in the measurement year
- Chart audit looks for evidence that a KPM service was provided to clients in the eligible population
- KPM guidance and sample documents are posted on the Data Requirements tab of the SPO website

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KPM Training Webinar

Full KPM webinar recording and PowerPoint are posted on the Trainings and Presentation tab of the SPO website

- KPM background and purpose
- Impact of KPM audits
- Review of KPM Guidance documents
- Age range and exclusions for each KPM

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SPO Website - KPM Guidance Documents

[Click here to access SPO website and KPM Guidance Documents]

Guidance documents include:

- Measure Description
- Eligible Population
- Exclusions
- Measure Specifications
- FAQs
- Resources

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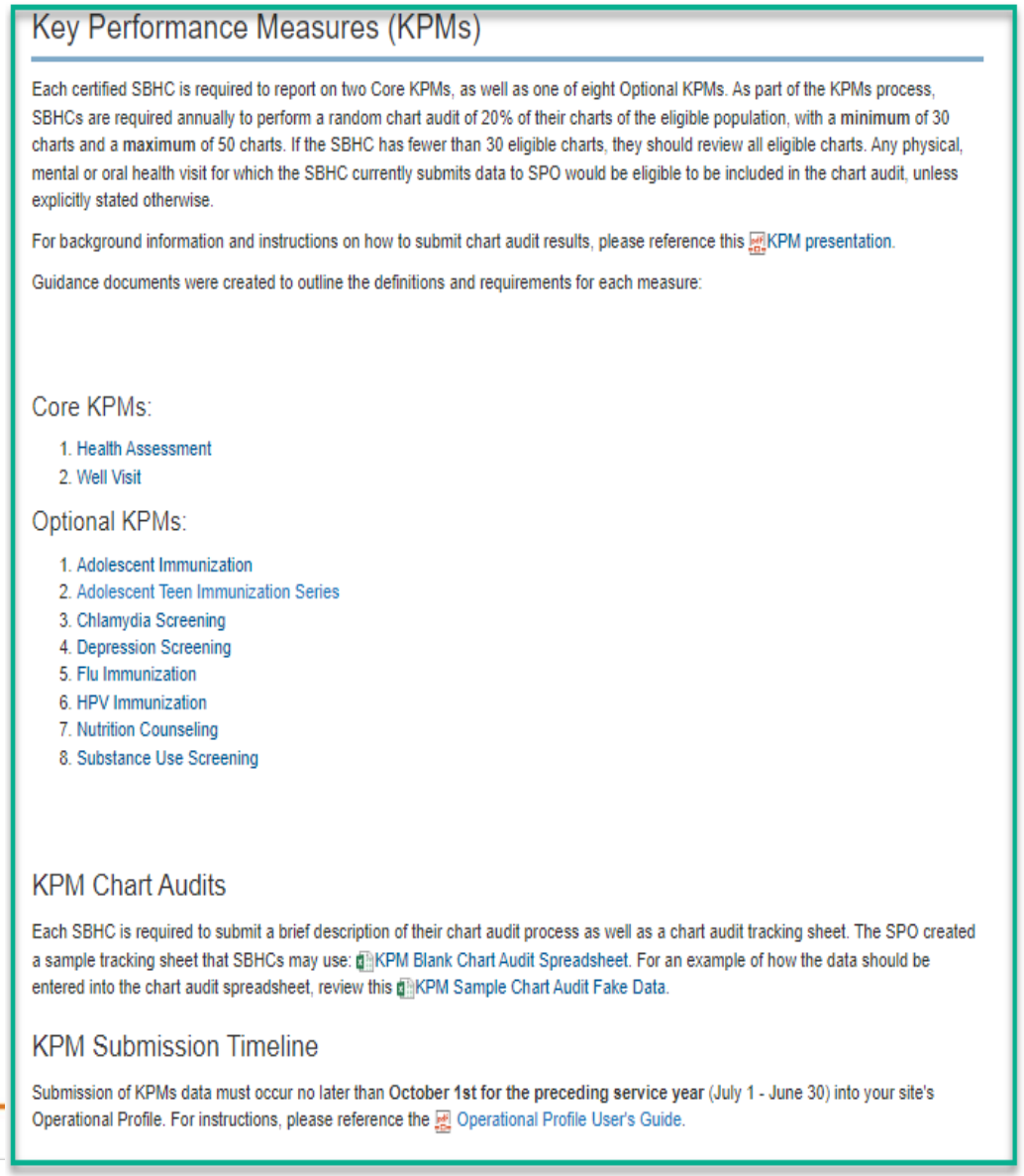

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For background information and instructions on how to submit chart audit results, please reference this KPM presentation.

Guidance documents were created to outline the definitions and requirements for each measure:

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KPM Chart Audits

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KPM Submission Timeline

Submission of KPMs data must occur no later than **October 1st for the preceding service year** (July 1 - June 30) into your site's Operational Profile. For instructions, please reference the Operational Profile User's Guide.

Audit Process Document Submission

Chart Audit Process Summary should answer the following:

- How did you identify charts from the eligible population for each KPM?
- How many clients were eligible?
- How were charts randomly selected?
- How did you decide if a chart was compliant or excluded?
- How was the compliance percentage calculated?

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Selecting Charts to Audit

Randomly choose 20% of SBHC charts from eligible population with a minimum of 30 charts and maximum of 50.

- Include any physical, mental/behavioral or oral health visit for clients in the designated age range (do not include clients over 21)
- Review Guidance document for client age range and other specifics client information before performing audit
- SBHCs do NOT audit charts for the immunization KPMs. Must provide client list to SPO.

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Audit Tracking Sheet

- Tracking Sheet must include:
  - Patient ID/MRN
  - Client age
  - If visits reviewed were in-person/telehealth/both
  - Compliance/Non-compliance for each measure
  - Reason if chart was excluded or not reviewed.
- A blank template of the tracking sheet is posted on the SPO website as well as a sample sheet with fake data to guide your submission.

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Audit Tracking Sheet Submission

- Submit the chart audit tracking sheet to Loretta via secure email for approval.
- If you need a secure email initiated by our office between 9/22 and 9/30, send a request to the SPO at SBHC.Program@odhsoha.oregon.gov

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Immunization KPMs

- ALERT Immunization program performs audit for all Immunization-related KPMs.
- SBHC sends via secure email a spreadsheet to Loretta with ALL clients in the eligible population.
- Spreadsheet must include separate columns with client name, Medicaid ID (if appropriate), date of birth, gender, street address, city and zip code
- *Review Guidance documents posted on the SPO website to identify eligible population.*

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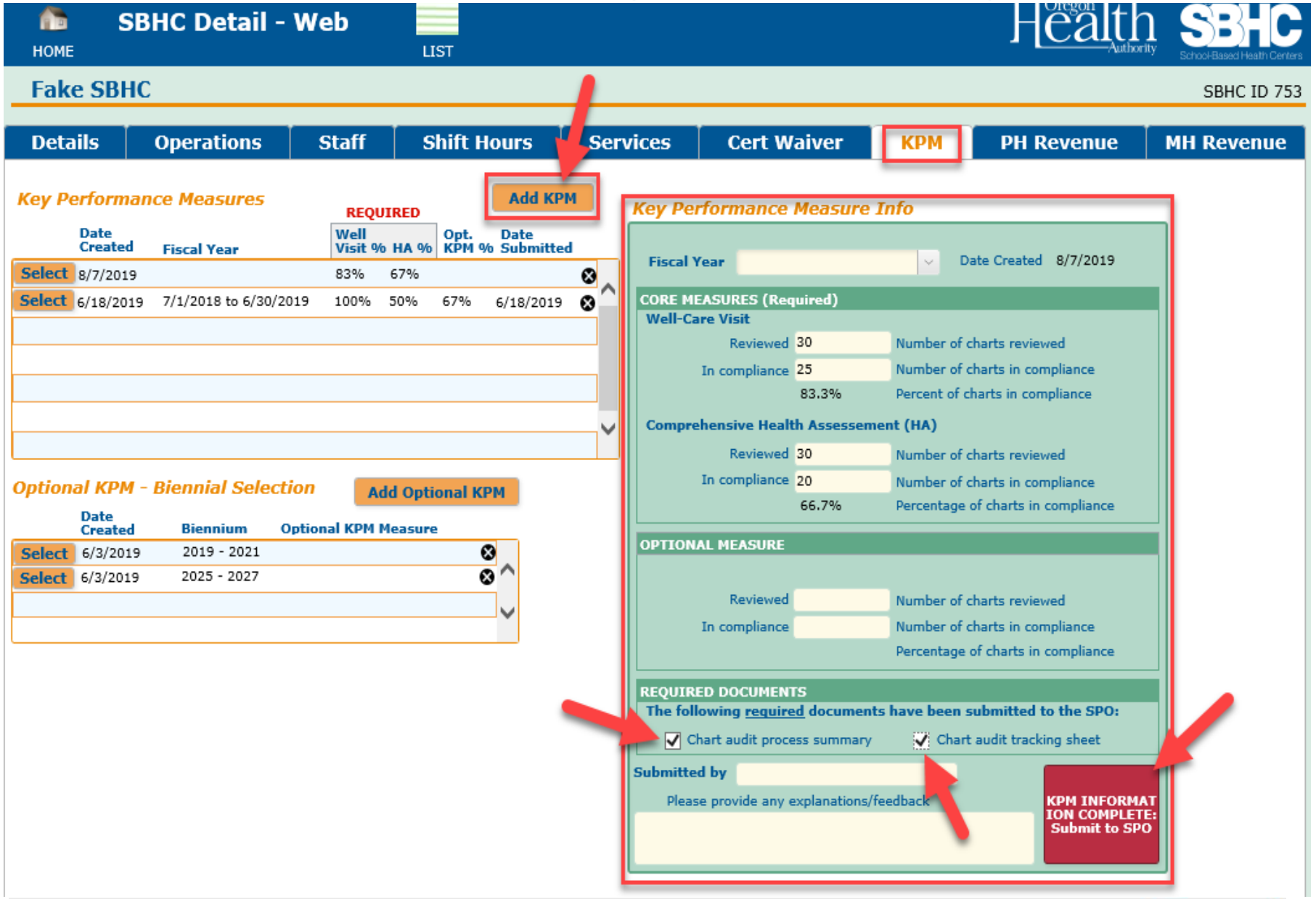
KPM ‘tab’ – Creating a new entry



QUESTIONS BREAK

Before the ultra exciting Financial/Revenue entries!

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Financial/Revenue entries

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Financial Revenue Tabs

- Physical health and dental services (PH Revenue tab)
- Mental/behavioral health services (MH Revenue tab)
- Separate login for an outside Mental Health agency to submit their Financial entry (email SPO to request this login)
- Entry covers the *previous year* (July 1, 2024 – June 30, 2025)

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PH Revenue Tab

PH Revenue Detail ‘tabs’

PH Revenue Detail 'tabs'

PH Revenue Detail 'tabs'

MH Revenue Tab

- Separate Account Login and Password can be assigned to an outside Mental Health agency who wants to enter SBHC-related revenue and funding directly into the OP.

  Email request for Login and Password: SBHC.PROGRAM@ODHSOHA.oregon.gov along with the name of your agency and SBHC(s) in the email request.

- Medical sponsors providing direct MH/BH services use their existing OP Login and Password.

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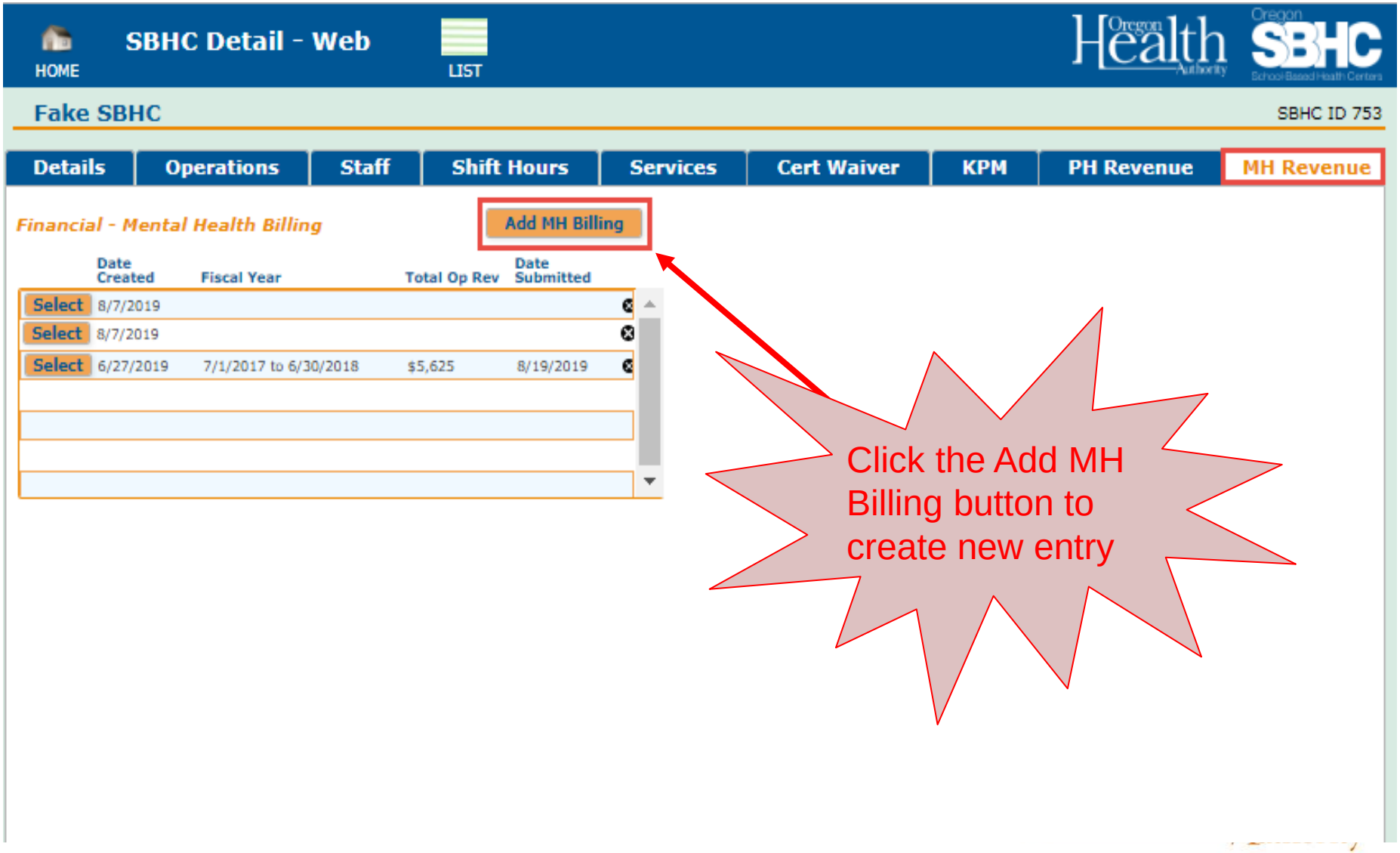
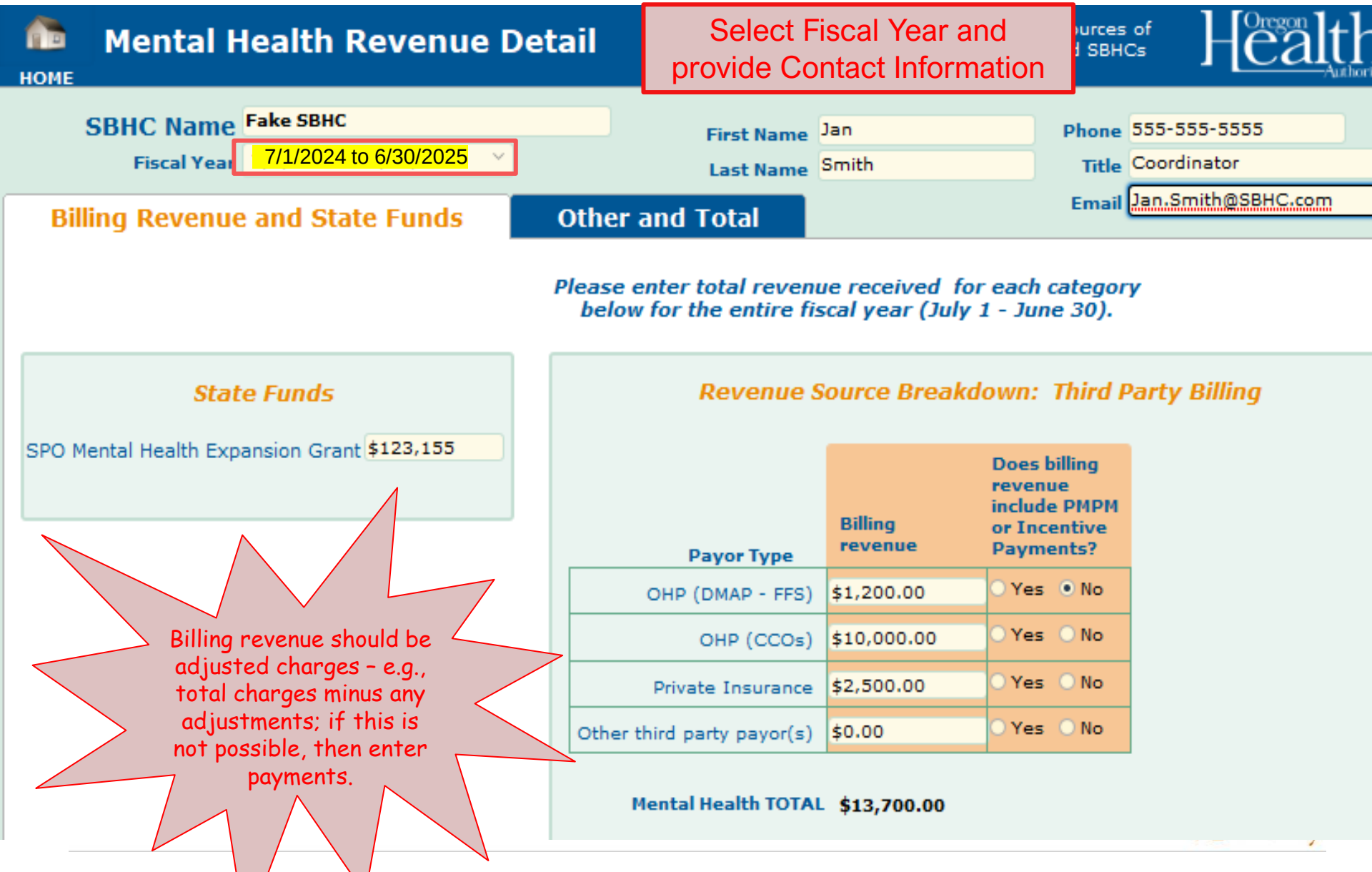
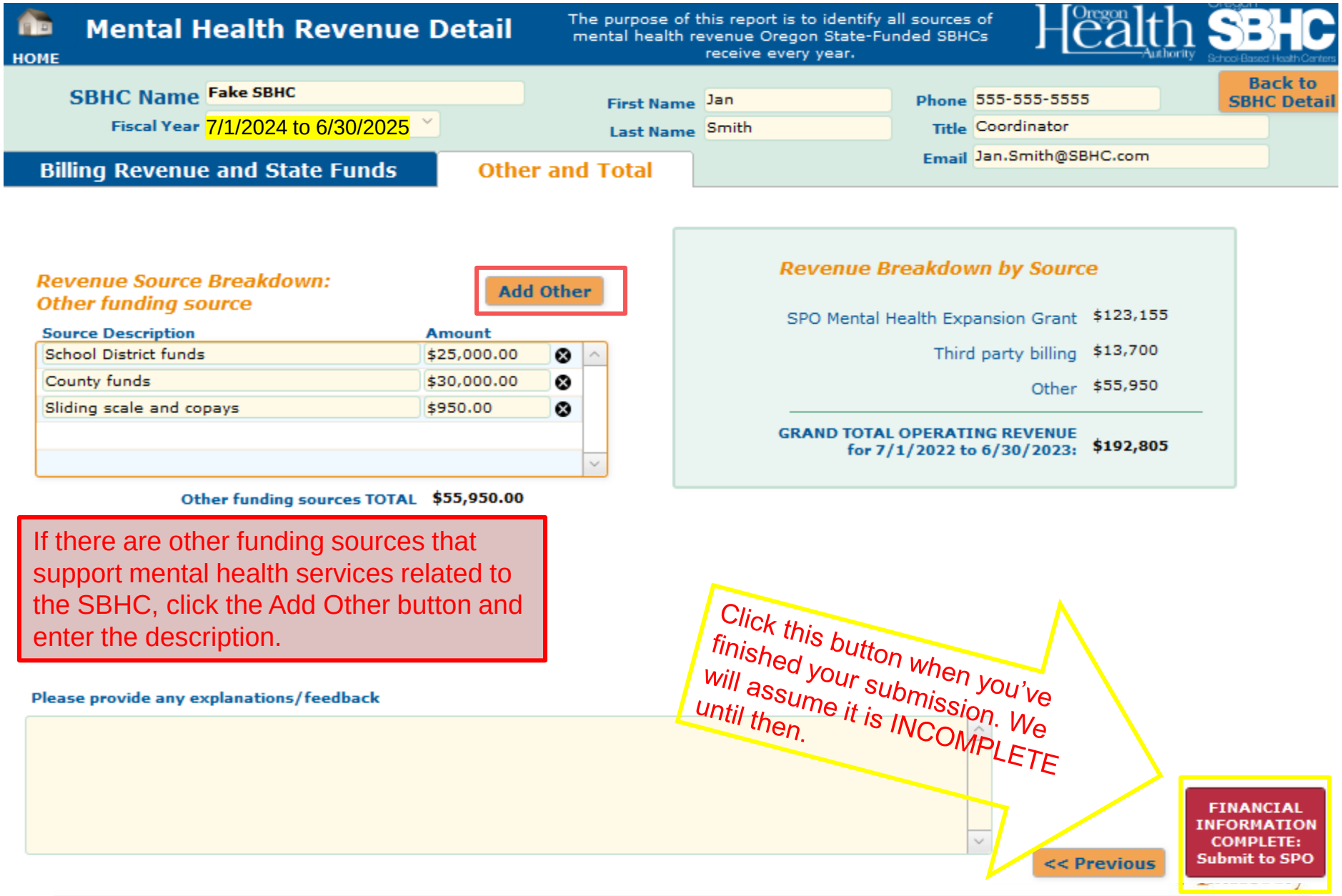
MH Revenue Tab



MH Revenue Detail tabs



MH Revenue Detail tabs



SPO Operational Profile Audit Process

Immediately following the October 1st deadline:

- SPO will review OP information for the following:
  - Unchecked confirmation boxes at the bottom of each tab

    Details, Operations, Hours of Operation, Staff, Shift Hours, Services
  - Minimum operating hours or staffing requirements are not met
  - Missing KPM audit results
  - Missing financial entries
- SBHC will be notified if they are out of compliance, or any information is missing

Oregon SBHC School-Based Health Centers

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Final Helpful Hints

- Check with staff from outside MH/BH or Dental agencies to ensure their credentials, shift hours, and contact information is correct.
- Send KPM audit process and tracking documents to Loretta
- Tracking sheet must be sent via secure email. Send email to SBHC.Program@odhsoha.oregon.gov if you need our office to initiate a secure email between 9/12 and 9/30.

Oregon SBHC School-Based Health Centers

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SPO Contact Information

School-Based Health Center Program
Oregon Public Health Division
800 NE Oregon St., Ste. 805
Portland, OR 97232
SBHC.Program@odhsoha.oregon.gov

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FINAL QUESTIONS?

Oregon SBHC School-Based Health Centers

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