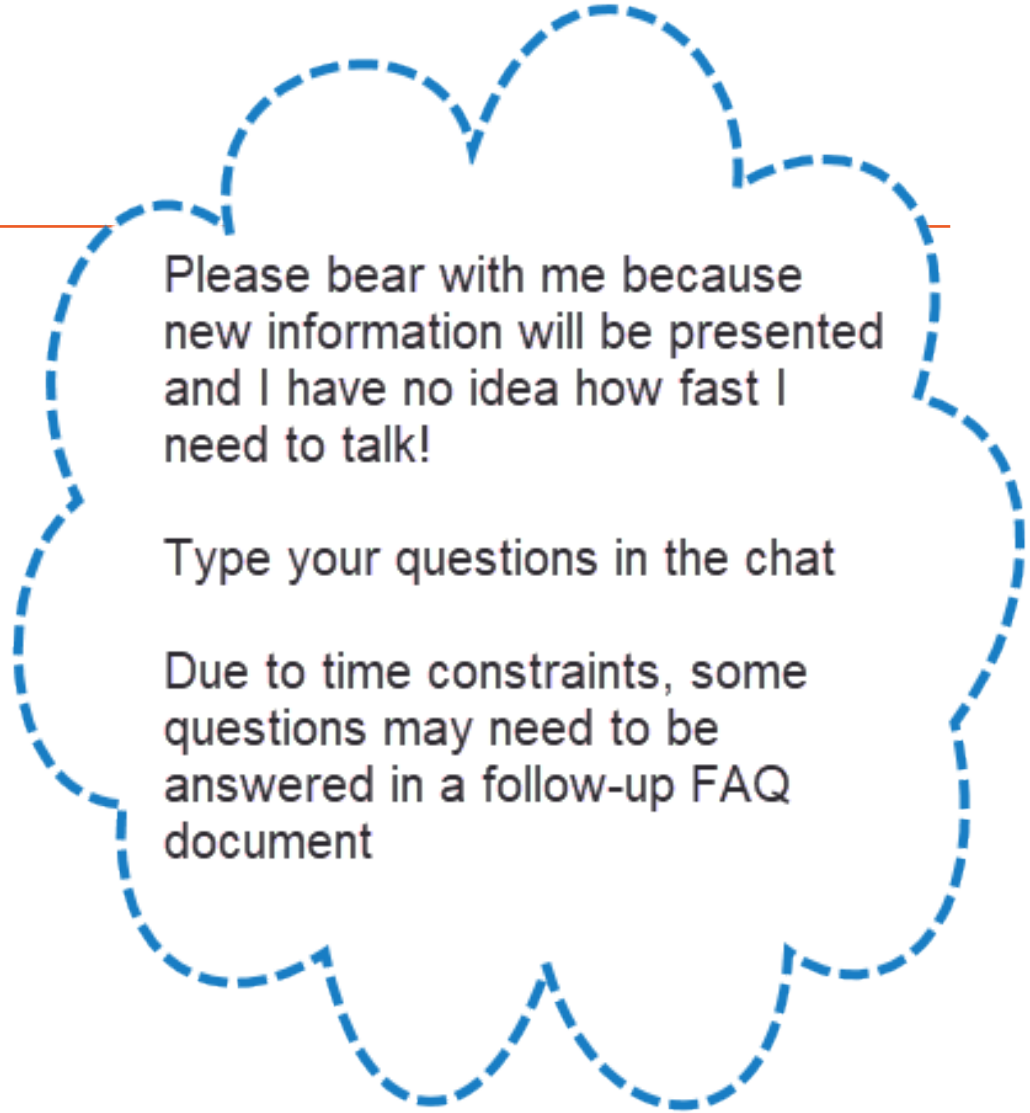
SBHC Operational Profile Overview

Medical Sponsors & Behavioral Health Sponsors

August 2026

Agenda

- ✓Purpose of the Operational Profile
- ✓Database layout
- ✓SBHC staff roles and who to include
- ✓SPO audit process
- ✓Helpful hints
- ✓EEEK! How do I get to the database?



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What and why of the Operational Profile (OP)

- The OP is an online database where sponsors document info about their SBHC
- Link to access the Operational Profile
- Information from the OP assists the State Program Office (SPO) when verifying the SBHC is compliant with the Standards for Certification, Version 5

Operational Profile data and compliance

SBHCs submit information into the OP that attests they are meeting the requirements in the Standards for Certification

- SBHC staff and certification-required roles
- Clinic operations and hours
- Partner engagement activities
- Contraceptive services
- Financial revenue entry

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Updating the Operational Profile

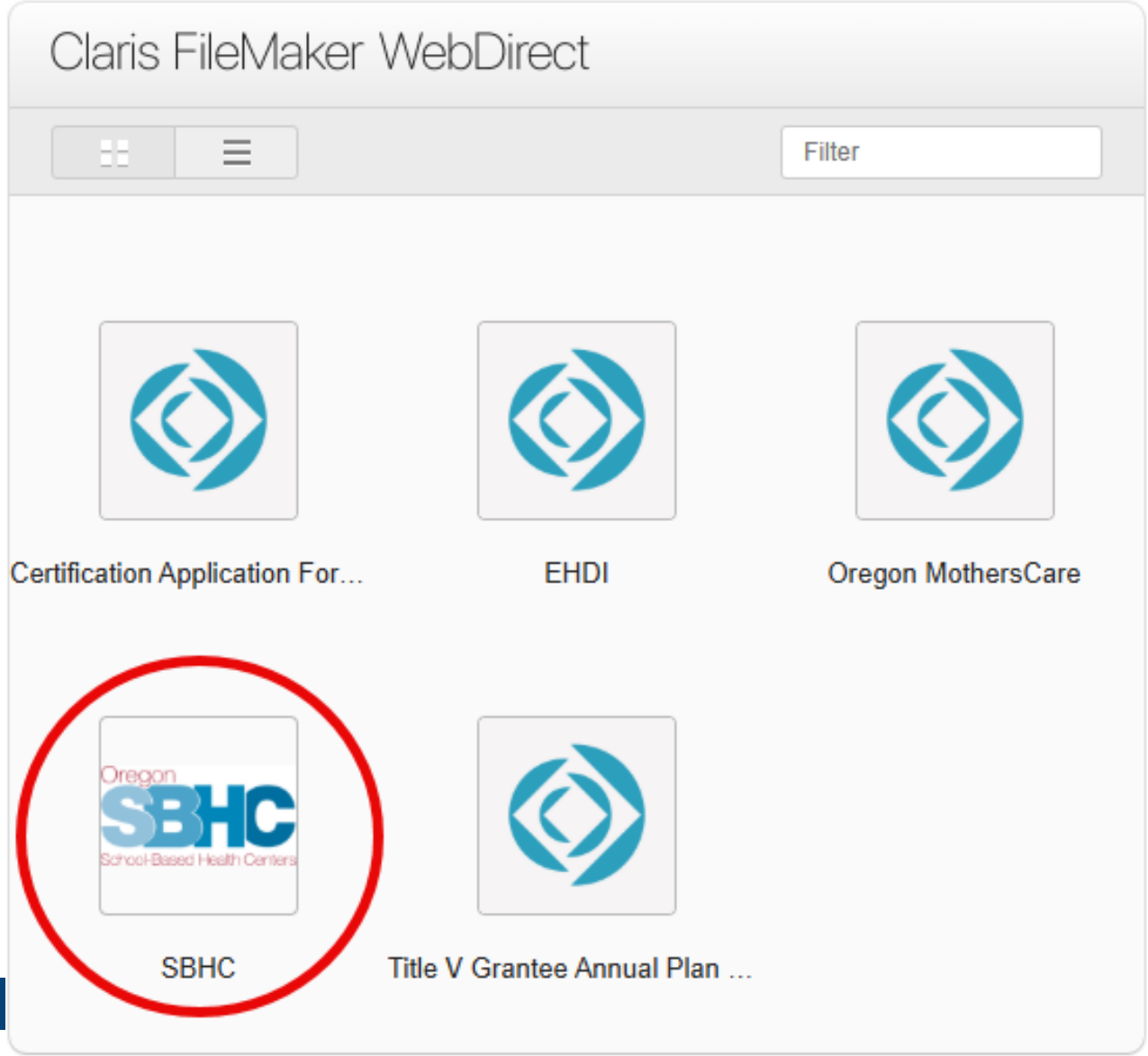
- Responsibility for updating the OP has shifted from solely the medical sponsor to joint documentation by medical and behavioral health sponsors.
- Behavioral health sponsors will have access to create, update, and maintain their staff information, and will continue to submit their revenue entries.
- When medical and behavioral health sponsors are within the same agency, they determine who is responsible for updating and maintaining behavioral health staff records in the Operational Profile

Timing of Operational Profile updates

- Every October 1 to renew certification status **(this year's deadline is November 1)**
- Prior to a certification site visit
- Updating staff when someone leaves or joins the SBHC
- Submitting waivers when out of compliance with the certification standards

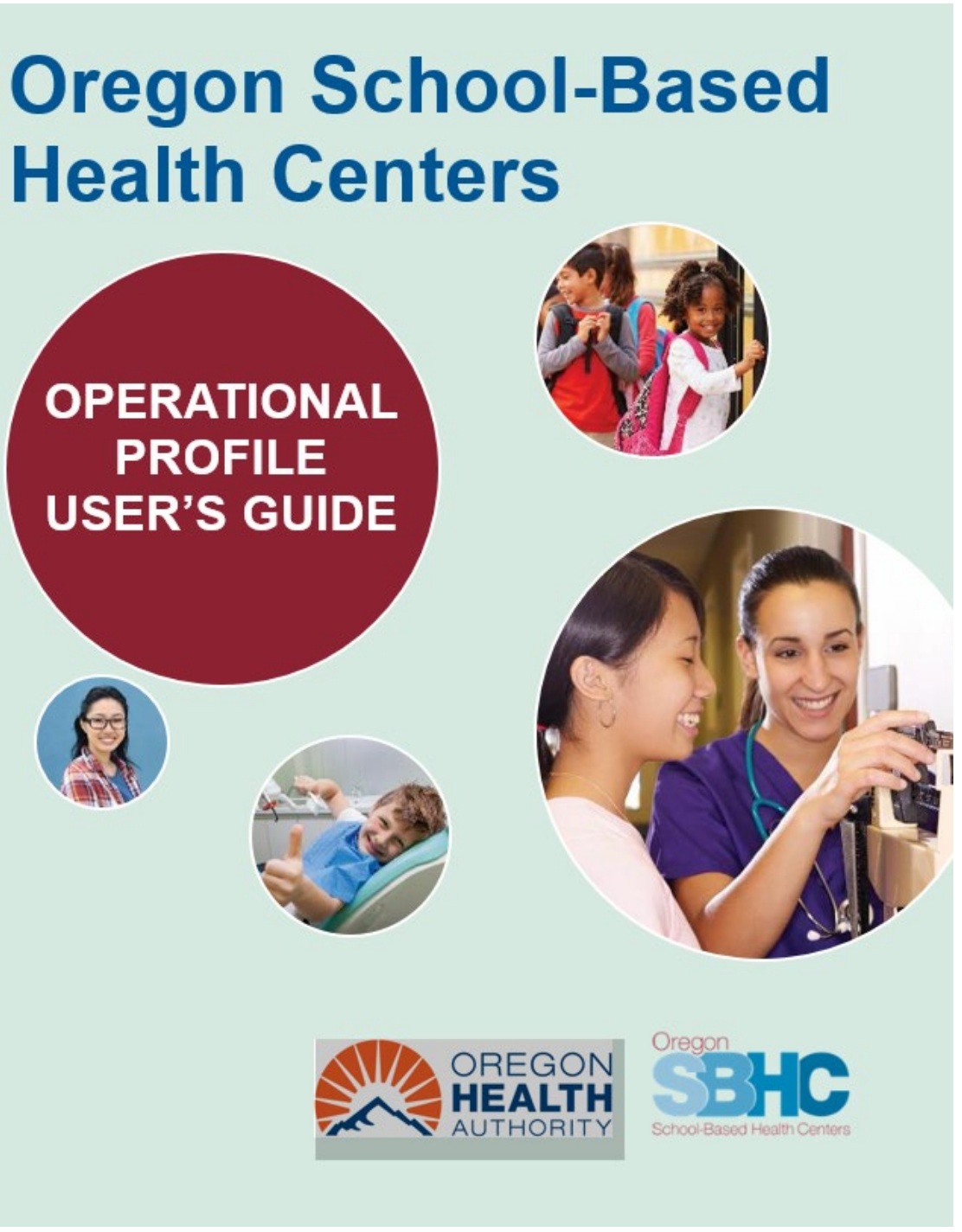
Accessing the Operational Profile

- Login and password are assigned by SPO
- One login is assigned to each sponsor and can be used by any of their staff
- Medical and behavioral health sponsors who are part of the same agency use the same login/password and will decide who is responsible for updating the OP.



OP User's Guide

- Do you like step-by-step instructions with screenshots and arrows?
- The Operational Profile User's Guide has additional details not reviewed here



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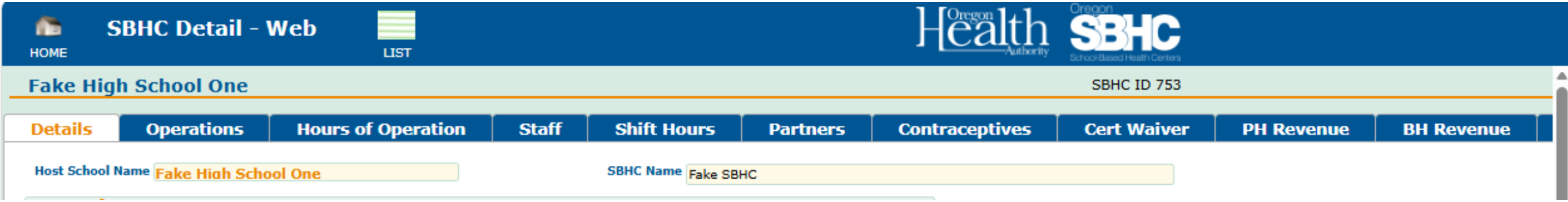
Operational Profile Layout

Operational Profile tabs and topic areas

- SBHC Details
- Operations
- Hours of Operation
- Staff
- Shift Hours
- Partners
- Contraceptives
- Certification Waiver
- Financial Revenue: Physical/oral health
- Financial Revenue: Behavioral health



Sponsor type and OP documentation

- Clinic operations and on-site hours (mostly medical sponsor)
- Details about staff, their roles, and on-site shift hours (medical and behavioral health sponsors)
- Partner engagement activities (medical sponsor)
- Contraceptive services (medical sponsor)
- Waiver for non-compliance of certification requirements (medical and behavioral health sponsors)
- Financial revenue entries (medical and behavioral health sponsors)

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Operational Profile tabs

- The next slides have a screenshot of each tab in the database
- Medical sponsor and behavioral health sponsor have different areas they must update, and some require collaboration.
- Review the Operational Profile User's Guide for step-by-step instructions on how to update and create entries on each tab of the database.
- Email questions to SBHC.Program@odhsoha.oregon.gov

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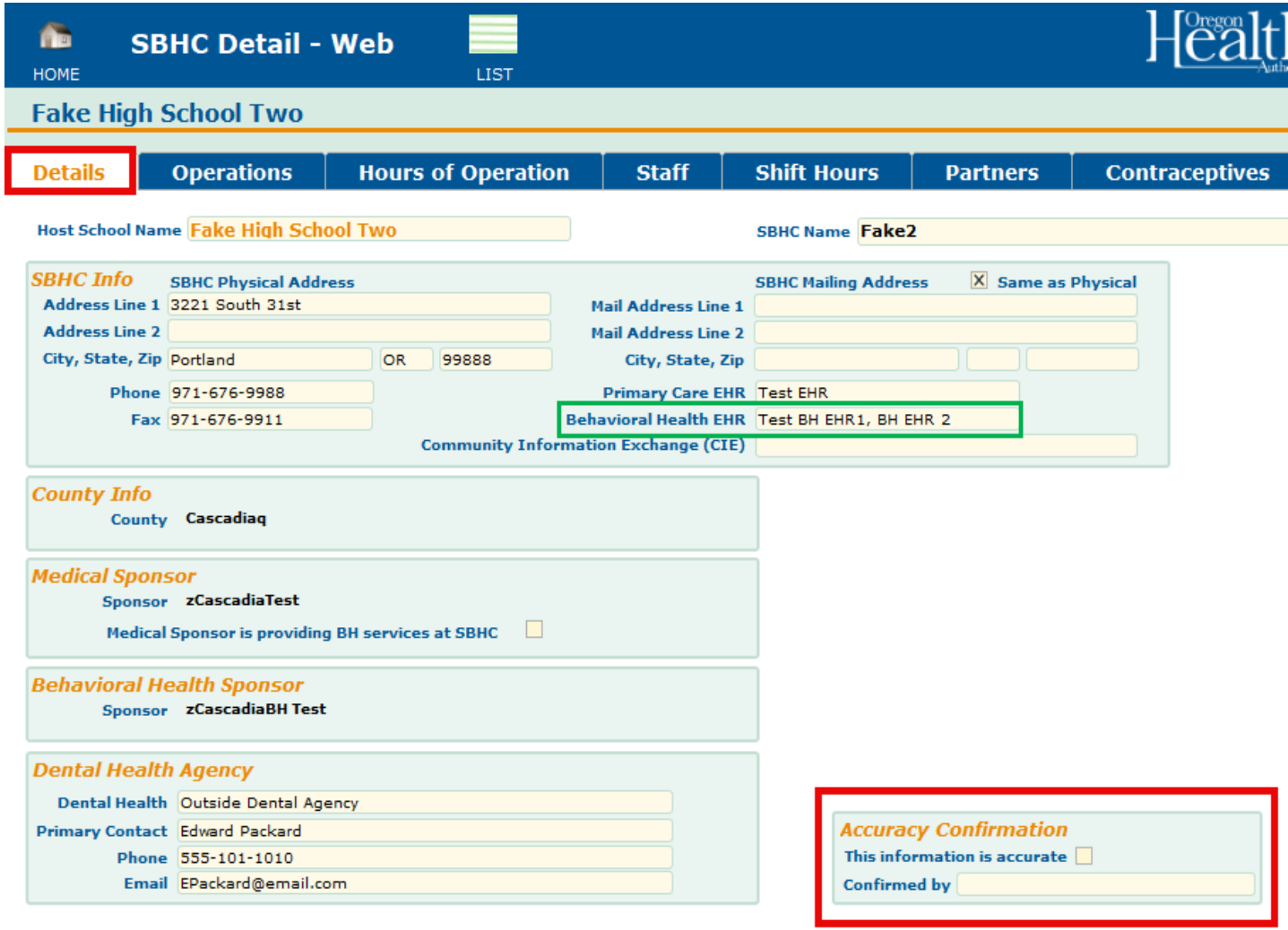
Details tab

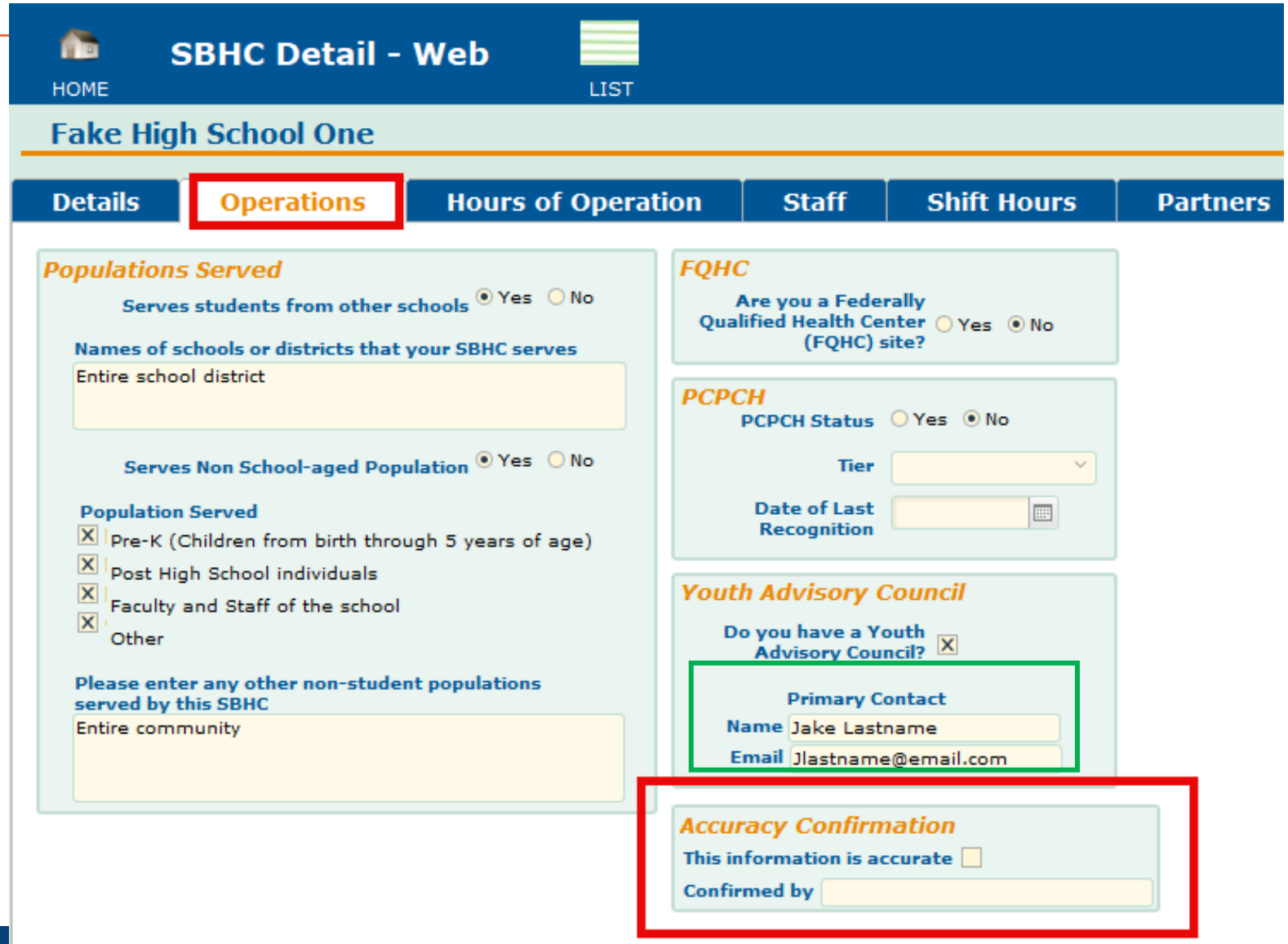
- Typically, very little information on this tab needs updating
- If an SBHC has behavioral health staff employed by medical sponsor and behavioral health sponsor, the green box should include the names of both electronic health record systems.
- Medical sponsor must update the remainder of this tab including confirmation box.



Operations tab

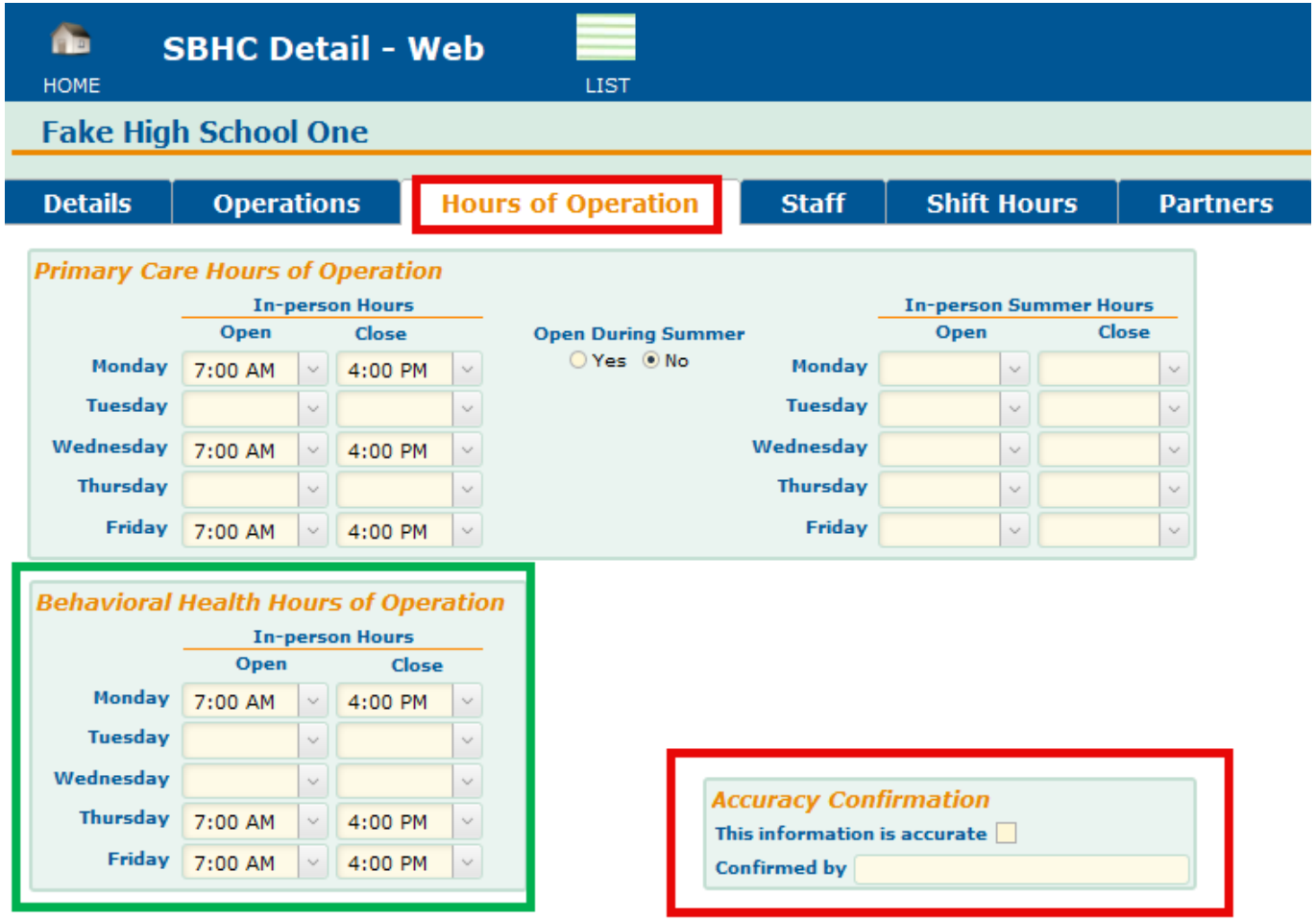
Medical sponsor is responsible for updating information on this tab including confirmation box.

However, if a behavioral health sponsor employs the Youth Advisory Council primary contact, they must update the area in the green box.



Hours of Operation tab

- Medical sponsor is responsible for the primary care hours of operation, summer hours, and the confirmation box.
- Behavioral health sponsor must update the behavioral health hours of operation. However, if medical and behavioral health sponsors both have behavioral health staff working in the clinic, this area should reflect all in-person behavioral health hours.

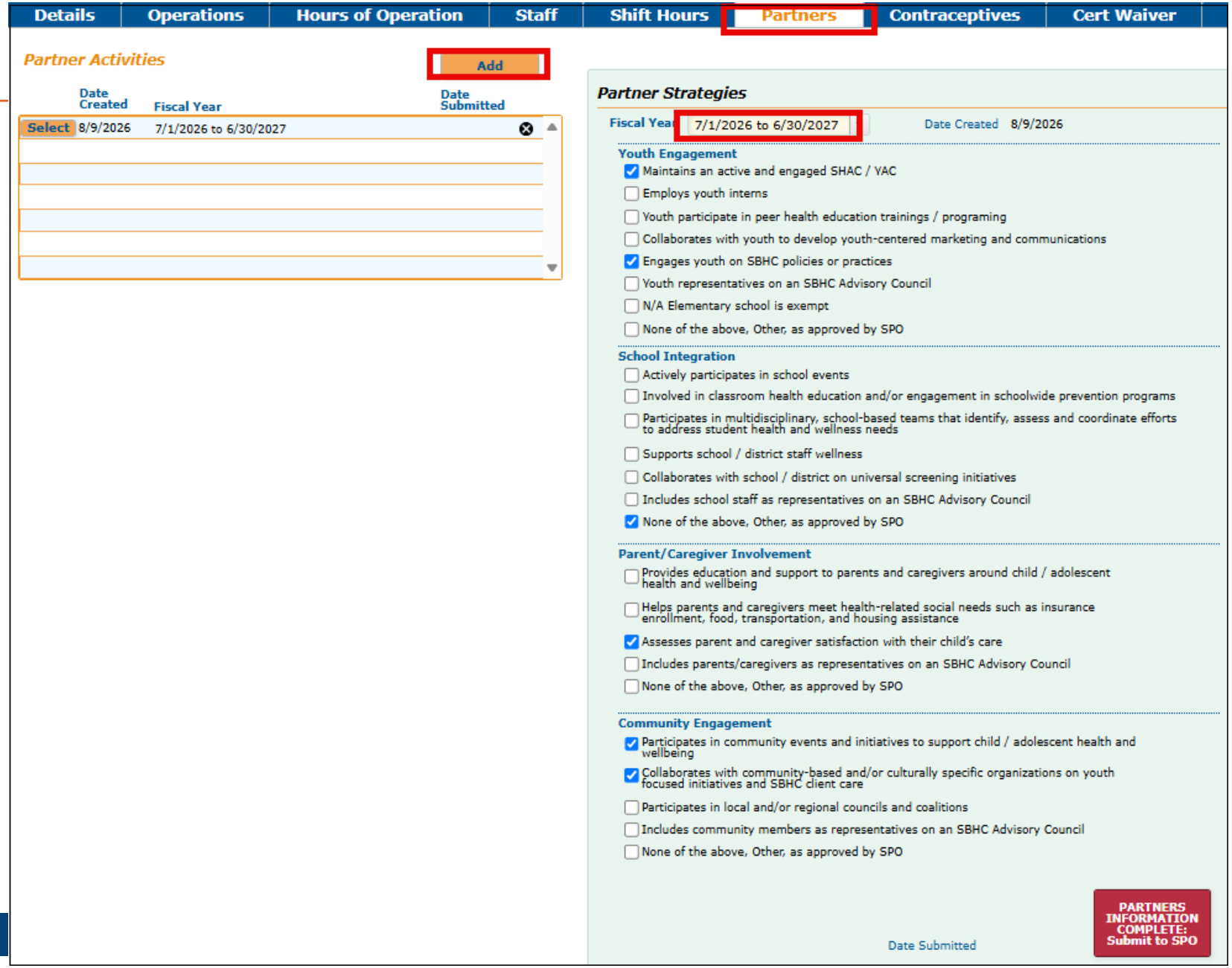


Partners tab

- Each year the medical sponsor will create a Partners entry in the OP that reflects current activities in the following areas:
  - Engaging youth,
  - Integrating within the school community,
  - Involving parents and caregivers in their child's care, and
  - Engaging the community.
- The medical sponsor and behavioral health sponsor are expected to discuss and collaborate on their current activities to ensure the Partners entry is complete and accurate.

Partner entry

- The Partner requirements are listed in the Standards for Certification, Version 5 in Section B.4: Sponsoring agency collaboration
- The Partner entry is an attestation to the activities of the sponsors and partners
- Historical entries will be saved

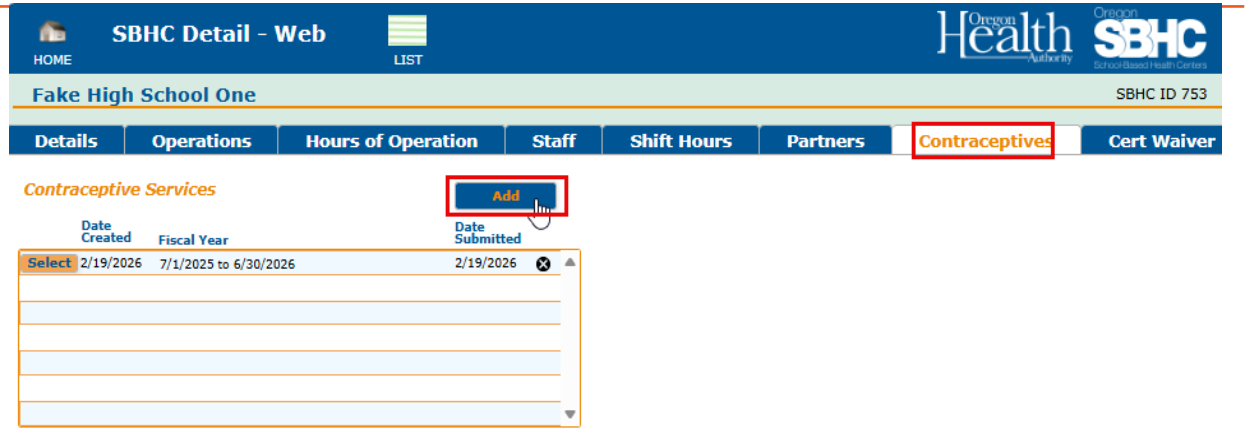


Partner activities – None of the Above response(s)

- If none of the checkboxes on the entry form describe current activities within a topic area, check the “None of the Above, Other as approved by SPO.” box and email the SBHC.Program@odhsoha.oregon.gov with a description.
- If you have multiple topic areas where your activities need approval, send them in one email.
- If you check one box in a topic area, do not send an email requesting approval for any additional activity you are doing.

Contraceptive Services tab

- Each year, every SBHC must complete a contraceptive services entry in the OP.
- While ES, MS and K-8 schools are not required in the standards for certification to dispense contraceptives, they must create an OP entry.
- The medical sponsor is responsible for creating the Contraceptive Services entry.
- See section F.1, table 2 in the standards for contraceptive requirements
- Sites must submit a waiver for non-compliance
- Historical entries will be saved



Waiver submission

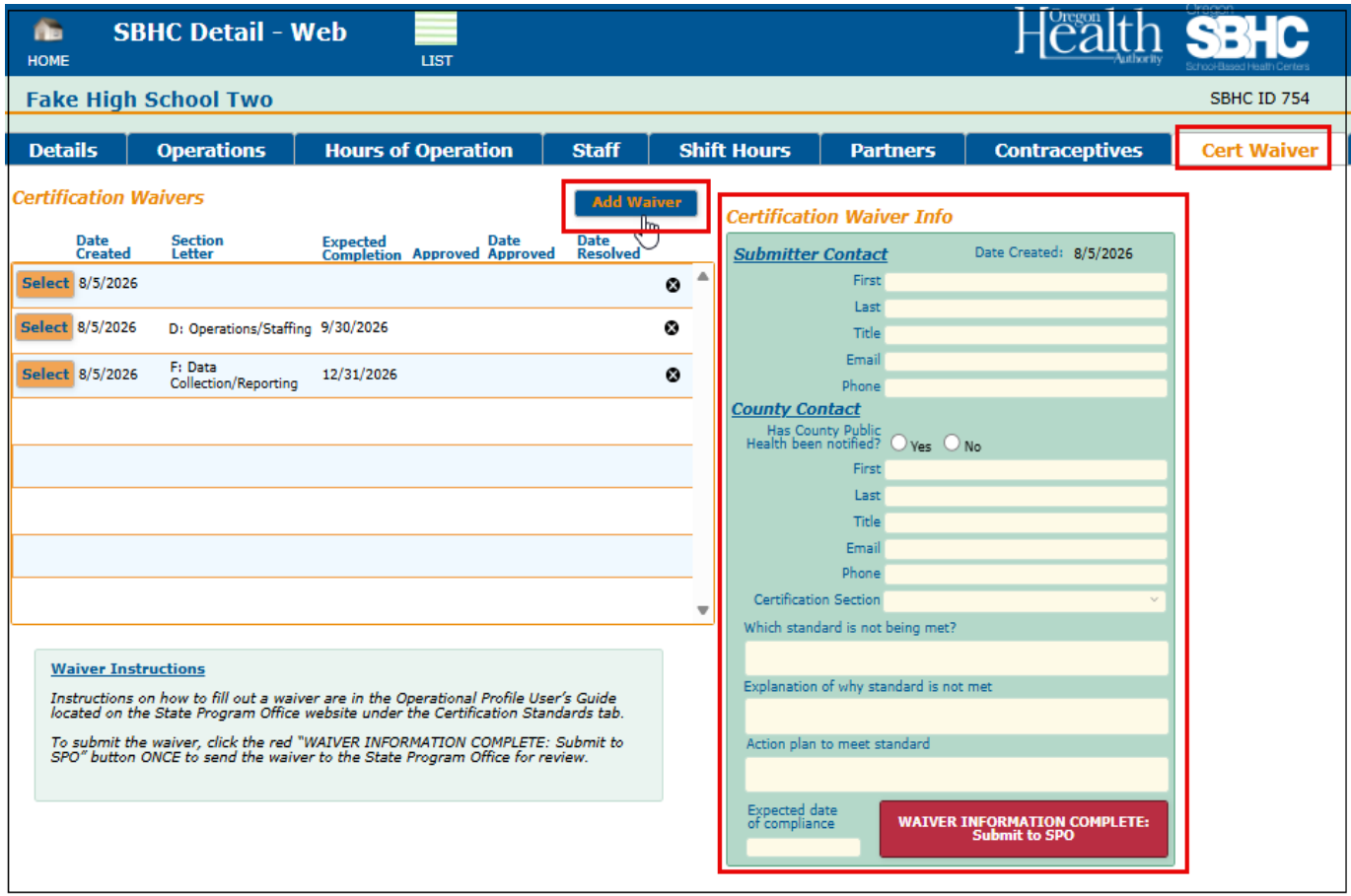
Waivers are entered in the OP when a clinic is out of compliance with the certification standards for 30 calendar days.

Examples of non-compliance include:

- Fewer than 10 hours primary care or 10 hours of behavioral health
- Not providing condoms plus one type of contraceptive on-site
- Unable to submit client school enrollment data in the encounter data report

Certification Waiver tab

- To create a new certification waiver entry, click the “Add Waiver” button on the top right side of the waiver list.
- Review the Operational Profile User’s Guide for step-by-step instructions on how to complete the sections of the waiver.
- The SPO will respond to the waiver submission within 14 calendar days.



Certification waiver entry

- Waiver entry in the OP must include:
  - Which Standard is not being met
  - Why it is not being met
  - Plan to come into compliance
- Information about waivers can be found in Section A.4 in the standards for certification
- Contact your assigned SBHC Public Health Nurse with questions.

QUESTIONS BREAK

SBHC staff roles and who to include

Certification-required staff roles

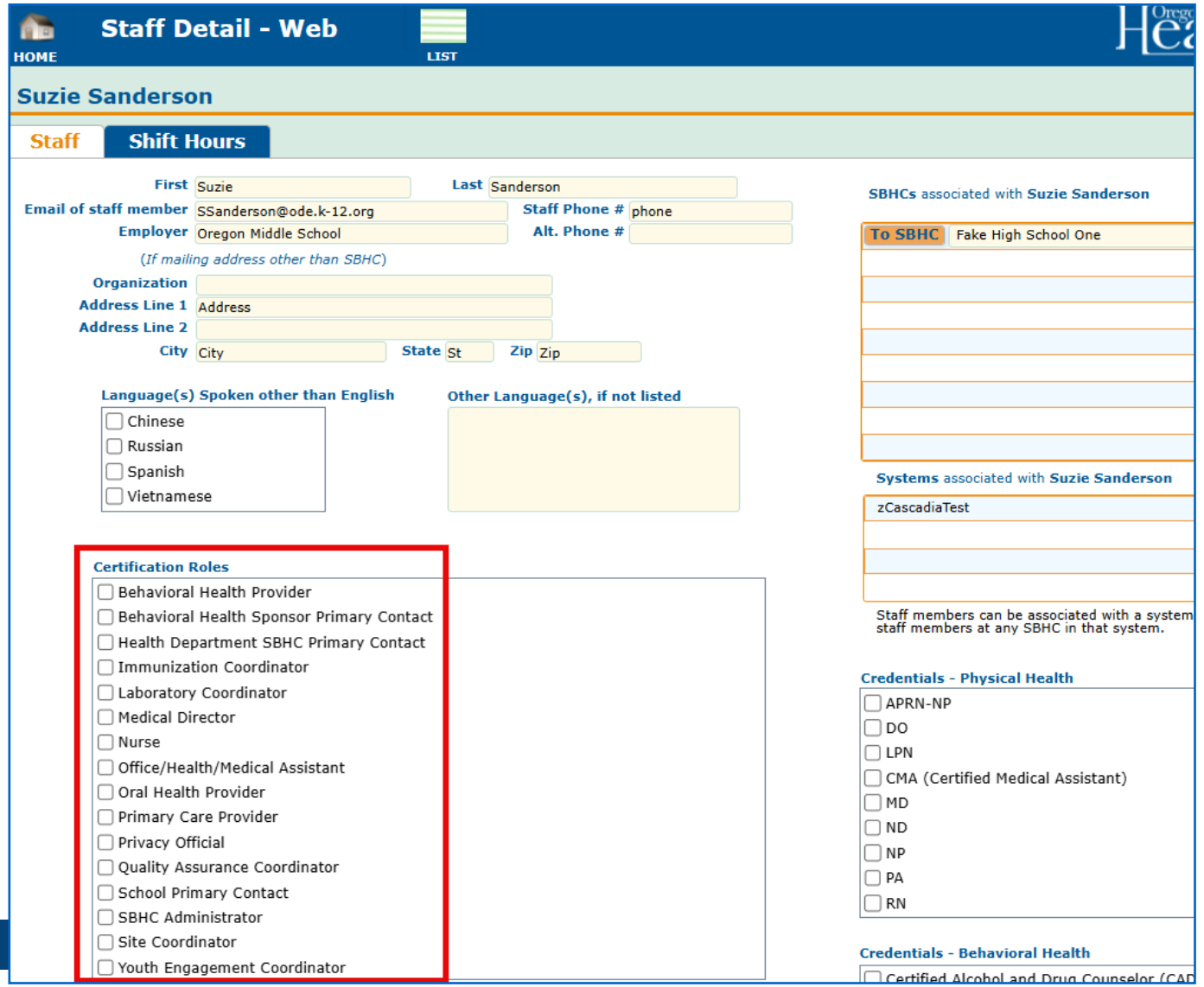
- Behavioral Health Provider (now required in the Standards for Certification, Version 5)
- Behavioral Health Sponsor Primary Contact
- Health Department SBHC Primary Contact (only required when a sponsor contracts with Local Public Health Authority)
- Immunization Coordinator
- Lab Coordinator
- Medical Director
- Office/Health/Medical Assistant
- Primary Care Provider
- Privacy Official
- Quality Assurance Coordinator
- SBHC Administrator
- School Primary Contact
- Site Coordinator
- Youth Engagement Coordinator

Email questions to: SBHC.Program@odhsoha.oregon.gov

New certification roles added

Standards Version 5 has new required roles:

- Behavioral Health Sponsor Primary Contact
- School Primary Contact
- Youth Engagement Coordinator



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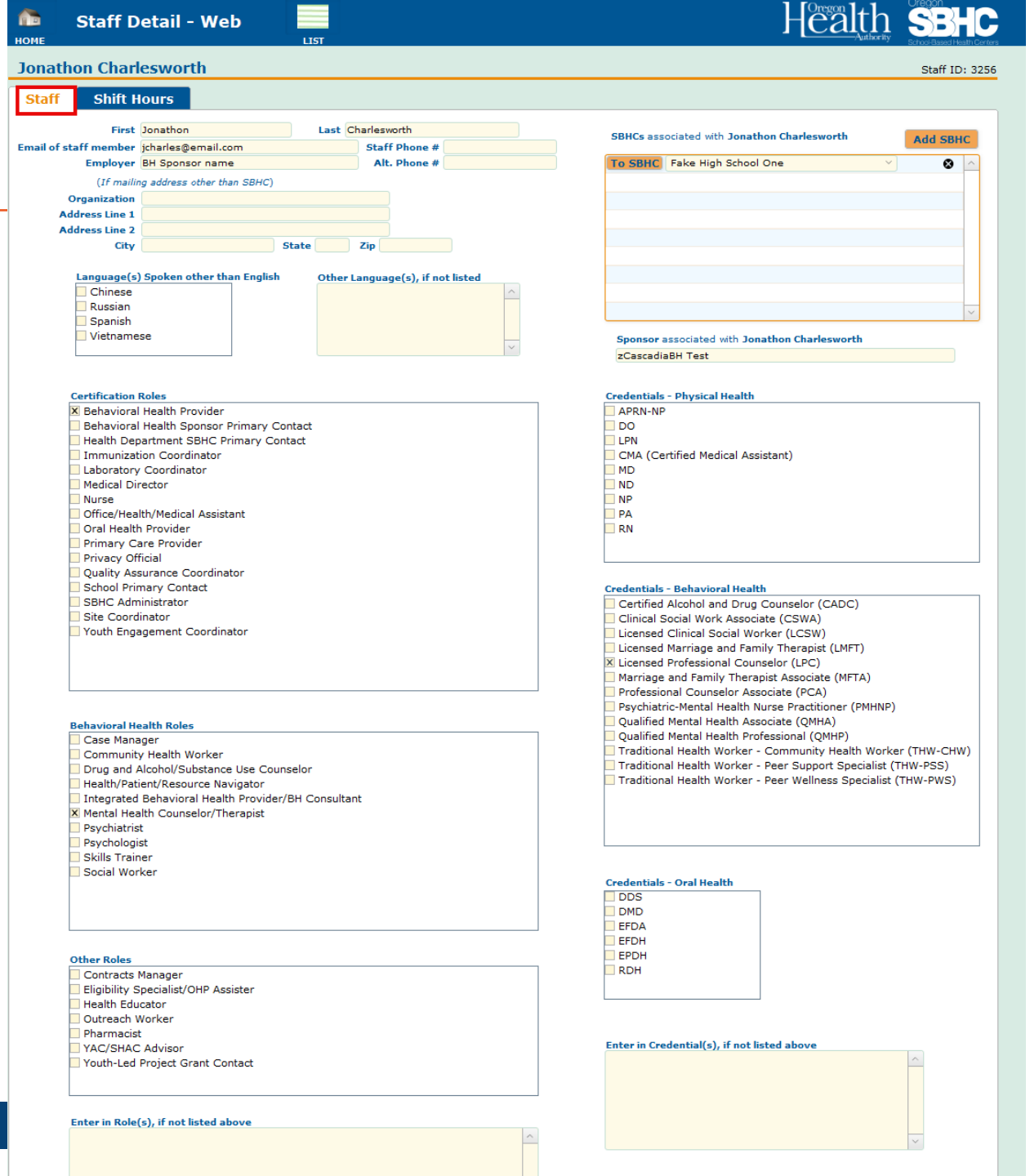
OP data and SPO email groups

Some certification roles documented in the Operational Profile are used to create email list groups

- SBHC Administrator and Site Coordinator
- Behavioral Health Sponsor Primary Contact
- Contracts Manager
- Youth Engagement Coordinator
- Health Department Primary contact (if applicable)

SBHC Staff Detail

- Sponsors have different logins that allow them to view but not edit each other's staff records
- With some fancy database programming, a behavioral health sponsor will have access to their existing staff records to easily edit, update or delete
- Review the OP User's Guide on how to add, edit, and remove staff who are no longer affiliated with the SBHC.



Staff Record – required information

•Email address, Agency/Organization, languages spoken other than English

•All certification-required roles must be assigned

•Staff can hold multiple roles; check all that apply

• Every staff record must have at least one role checkboxed; there is a free-text box if necessary

•Credentials: staff can have multiple credentials; ask staff to ensure accuracy and check all that apply

Behavioral health provider

- While this isn't a new role to SBHCs it is now a required role in the new certification standards.
- This staff might provide direct mental health care, integrated behavioral health care, substance use treatment, and/or other services to support emotional well being of youth.
- See the certification standards for examples of the different roles that meet the requirement, screenshot on the next slide

Behavioral health provider description in Standards

SBHC Standards for Certification, Version 5

Behavioral Health Provider:* A licensed, credentialed, or certified† provider with assigned staff hours at the SBHC and who can provide direct mental health care, integrated behavioral health care, substance use treatment and/or other services designed to support emotional well-being to youth ages 5–21. Roles of behavioral health providers may vary by SBHC based on local needs and resources and may include providers in roles such as:

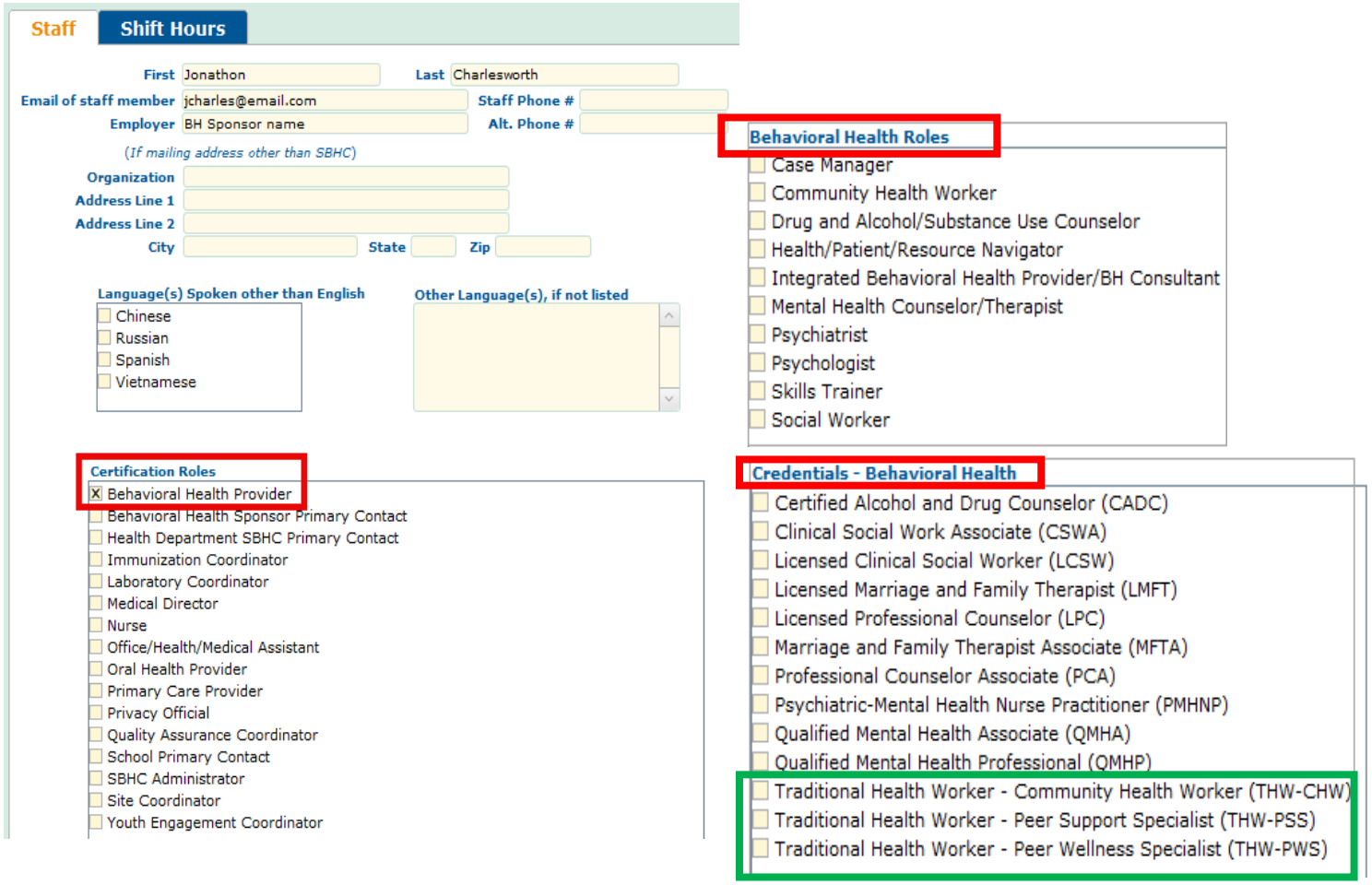
a. Case Manager;
b. Community Health Worker;
c. Drug and Alcohol/Substance Use Counselor;
d. Health/Patient/Resource Navigator;
e. Integrated Behavioral Health Provider/Behavioral Health Consultant;
f. Mental Health Counselor/Therapist;
g. Peer Support Specialist;
h. Peer Wellness Specialist;
i. Psychiatrist;
j. Psychologist;
k. Skills Trainer; and
l. Social Worker.

* Behavioral health is used to encompass mental health, integrated behavioral health, substance use treatment and other services designed to support mental or emotional wellness.

† This could include Board Registered Associates or providers who are licensed through State Approved Licensing Boards. This could also include those certified or credentialed through entities such as OHA's Traditional Health Worker (THW) Program, Mental Health and Addictions Certification Board of Oregon (MHACBO), OHA's Health Care Interpreter (HCI) Program, or Tribal based practices providers covered under Medicaid.

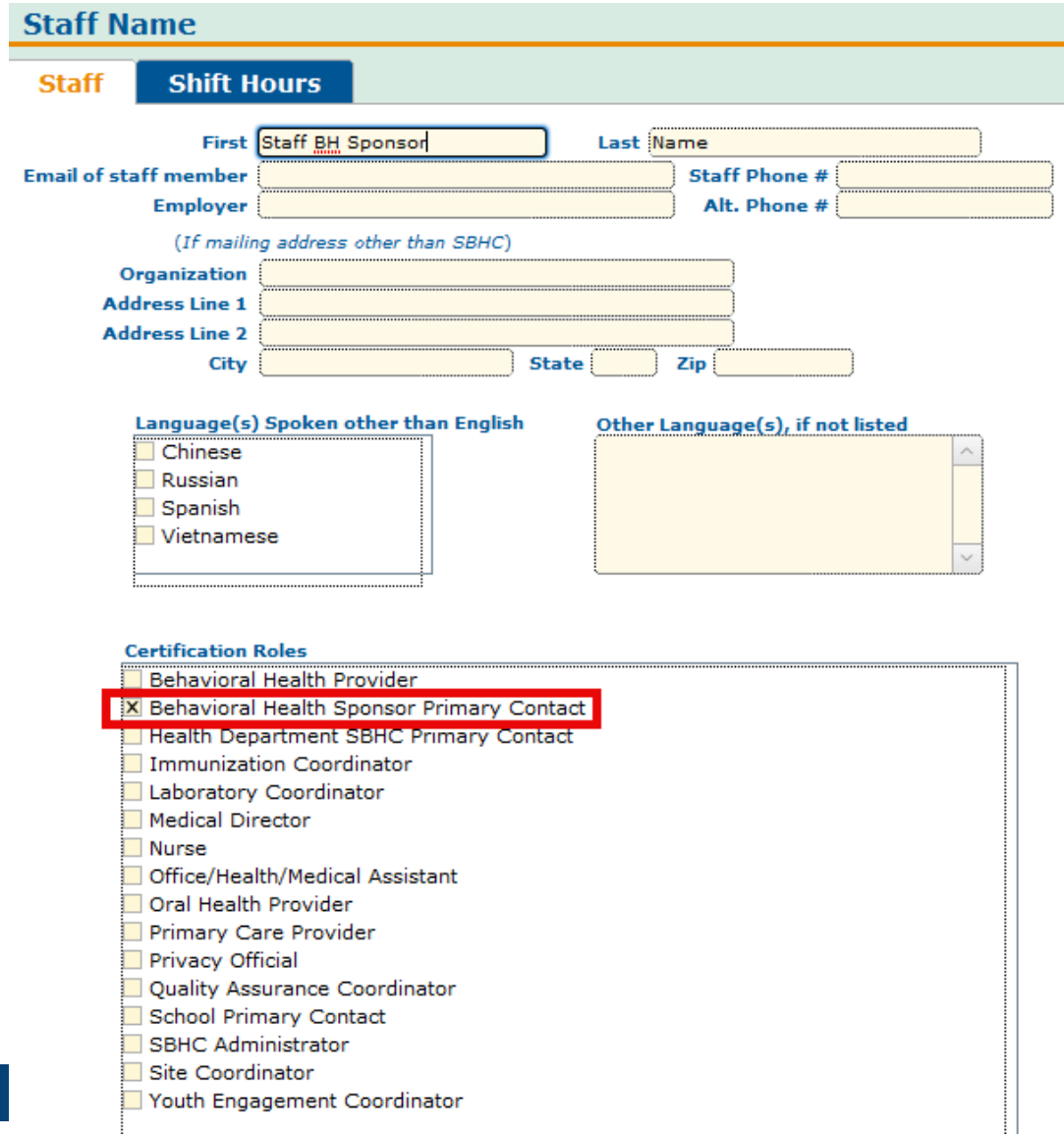
Behavioral health provider – roles and credentials

- If the Behavioral Health Provider box is checked, the staff must also have boxes checked in the BH role and credential areas
- Traditional Health Worker moved under BH credentials
  - Community Health Worker
  - Peer Support Specialist
  - Peer Wellness Specialist
- Be sure staff have the appropriate credential box checked.



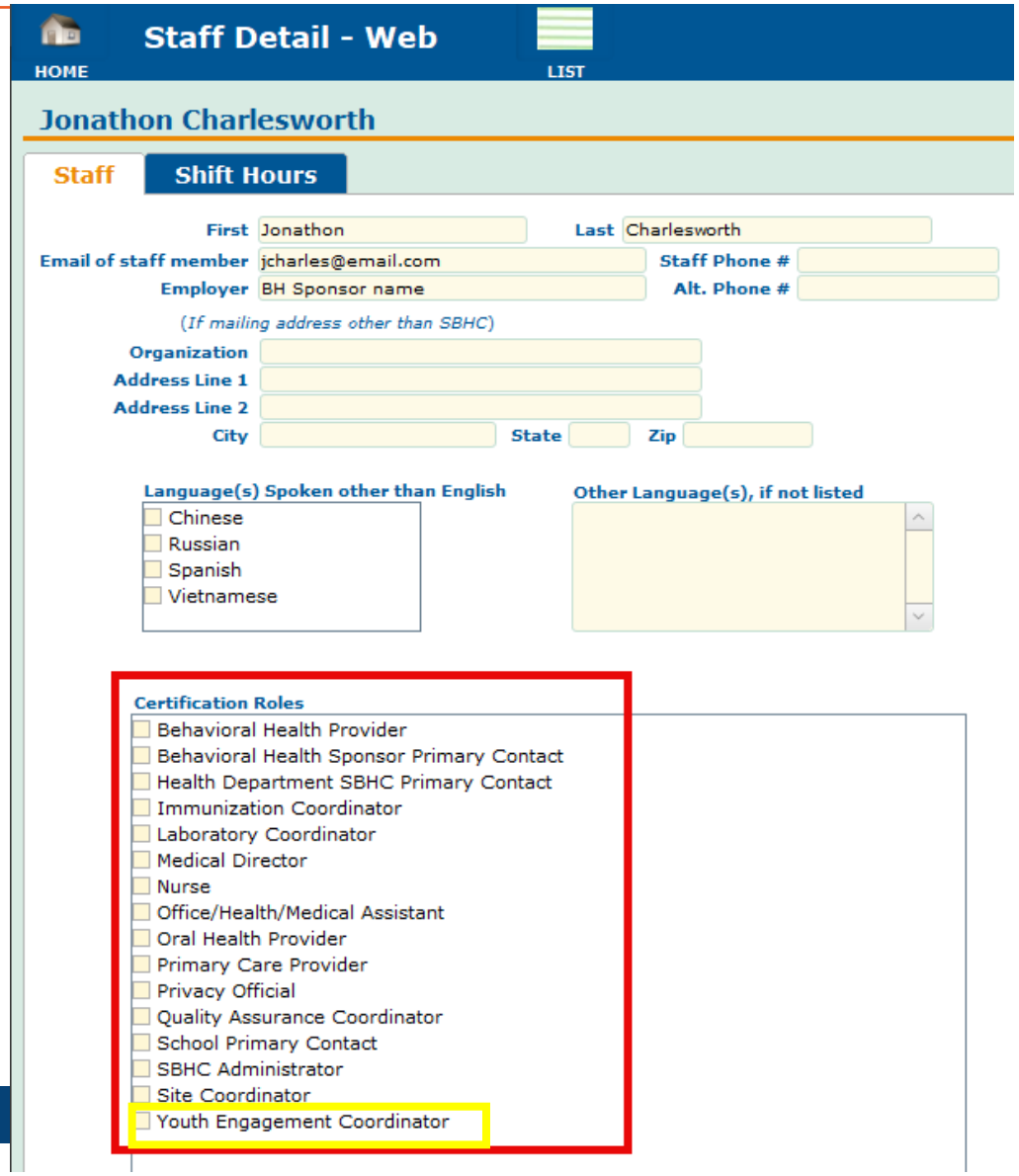
Behavioral health sponsor primary contact a new required role

As described on page 19 in the SBHC Standards for Certification, Version 5: this person is employed by the SBHC behavioral health sponsor who is responsible for overseeing SBHC behavioral health services. They are responsible for attending SPO meetings, preparing for attending verification site visits, and completing the Operational Profile.



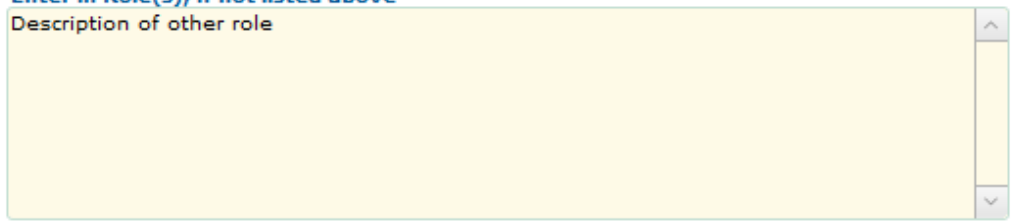
Youth Engagement Coordinator a new required role

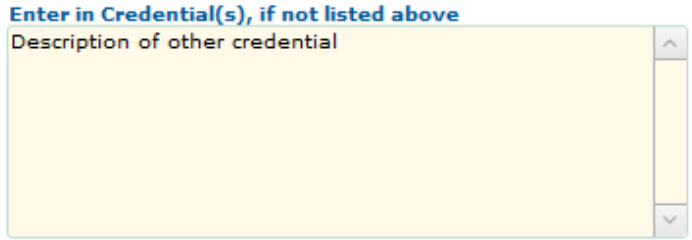
- Check the role box for staff employed by an SBHC sponsor supporting SBHC youth engagement efforts
- SBHCs located at an elementary school are exempt from this role requirement
- While the Youth Engagement Coordinator staff role is a certification requirement, it does not mean the SBHC must have a YAC/SHAC
- Email SPO with questions about this role



Staff record – Other Roles & Credentials

- There are new role checkboxes for the Contracts Manager and the Youth-Led Projects Grant Contact.
- These are not certification required roles, however adding the staff to the OP or checking the role box for staff already in the OP helps when issues arise or when email announcements need to be sent directly to those individuals.
- There are areas at the bottom of the Staff record to write in other Roles or Credentials applicable to a staff member if none of the existing check boxes are applicable





Staff tab display

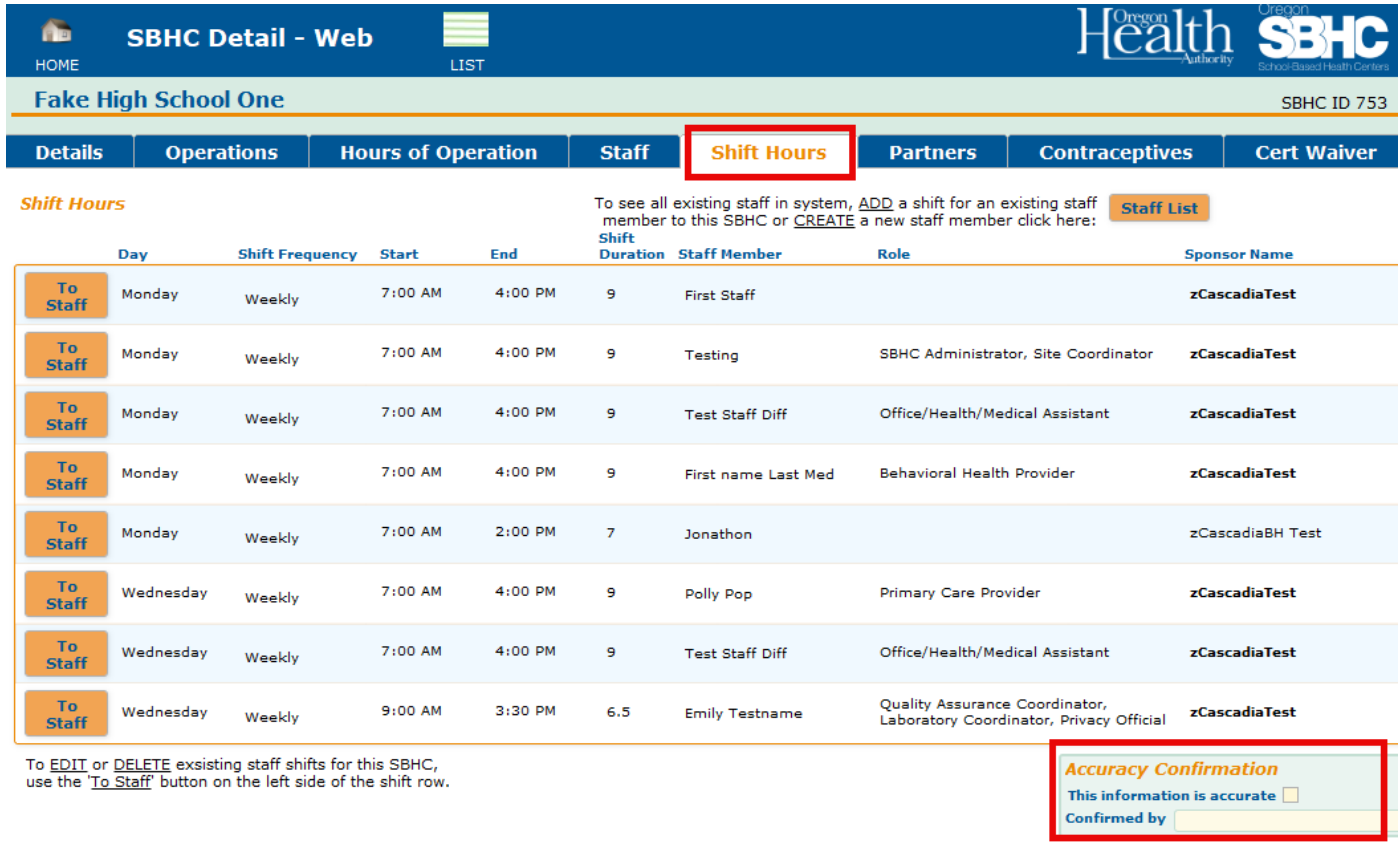
- Staff records for both medical and behavioral health sponsors will display here
- The bottom left of the tab will display any certification-required role that has not been assigned. You must check the box for an existing staff or add staff to the OP.
- The medical sponsor is responsible for verifying all roles are assigned and confirmation check box.

Which staff need shift hours

- Anyone who works on-site providing services to SBHC clients
- Staff who have a set weekly schedule as well as those who work once, twice or three times a month
- Do not include a shift hours if a staff is only providing telehealth services during that day's timespan
- Do not document multiple start and end times for a staff's lunch, there should only be one row per day

Staff Detail Shift Hours tab

- This tab summarizes staff shift hours entered by all sponsors.
- Be sure to review a staff's record if you do not see a shift hour on a day they are working in the SBHC.
- The medical sponsor is responsible for the confirmation check box.



Staffing requirements: type, hours, days

- Found on page 35 in the Standards for Certification, Version 5
- Submit waiver if SBHC does not meet the staffing requirements

(1) Office/Health/Medical Assistant — 15 hours/week;

(2) Primary care provider — 10 hours/week, at least two days/week;

(3) Behavioral health provider — 10 hours/week, at least two days/week; and

(4) Additional hours for youth health and wellness services — 5 hours/week to directly support youth to access the care they need. Staff hours that could be used to meet this requirement include, but are not limited to:

   i. Primary care, behavioral, or oral health provider, Office/Health/Medical Assistant, Nurse, YAC Coordinator, Traditional Health Worker, and/or peer educator, or other as approved by the SPO.

Table 1: SBHC minimum staffing requirements

SBHC staffing type	Minimum hours per week	Minimum days per week
Office/Health/Medical Assistant	15 hours	Unspecified
Primary Care Provider	10 hours	2 days
Behavioral Health Provider	10 hours	2 days
Youth health and wellness	5 hours	Unspecified
Total minimum hours open and operating: 15 hours/week, 3 days/week		

General OP helpful hints

- Changes are automatically updated; there is no Save button.
- Do not use your internet browser ‘back’ button. Use the buttons in the database by clicking on the different tabs or home icon.

- If you have multiple SBHCs, the home button takes you to a screen that list all clinics so it’s easy to click and access them
- If you’re struggling to update an area of the OP, email SPO with your questions: SBHC.Program@odhsoha.oregon.gov

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QUESTIONS BREAK

Before the exciting Financial/Revenue entries

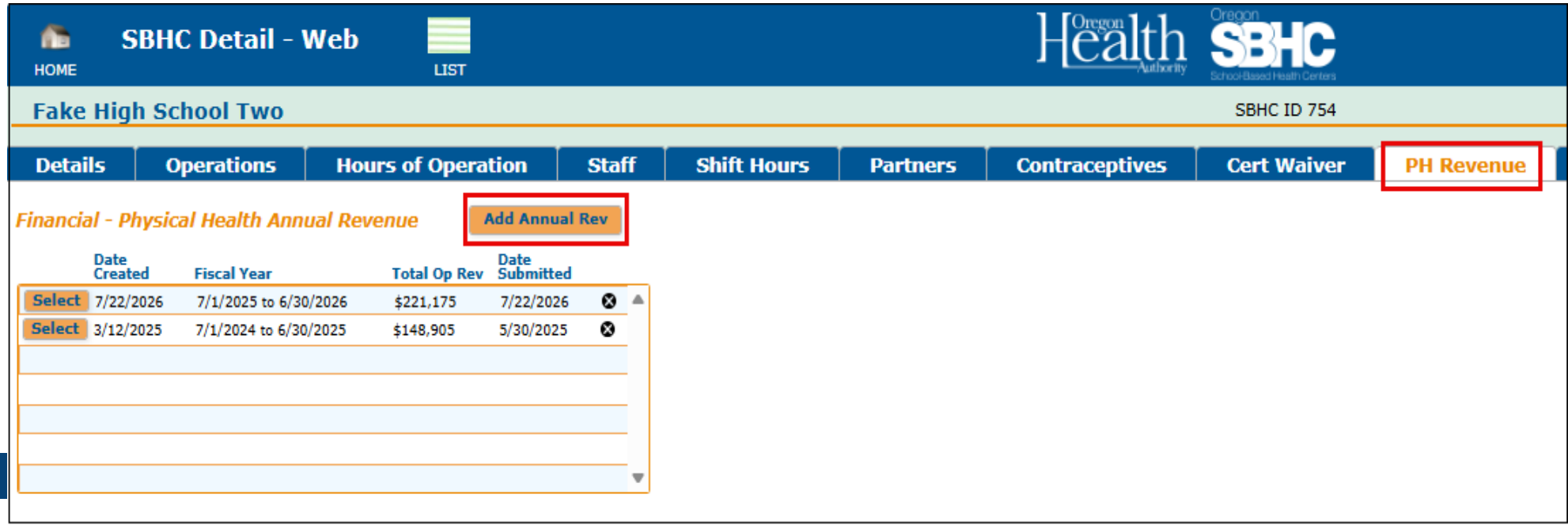
Financial/Revenue entries

Financial Revenue tabs

- Physical health and dental services (PH Revenue tab)
- Behavioral health services (BH Revenue tab)
- Information includes revenue from registration fees, insurance reimbursement from payors like Medicaid and Private Insurance, public and private funding used to operate the SBHC.
- Financial revenue entries are only visible to the sponsor that created it

PH Revenue tab

- This tab contains a list of all annual PH revenue entries previously submitted for the SBHC for physical and oral health services
- To create a new annual revenue entry, click the “Add Annual Rev” button



PH Revenue Detail tab

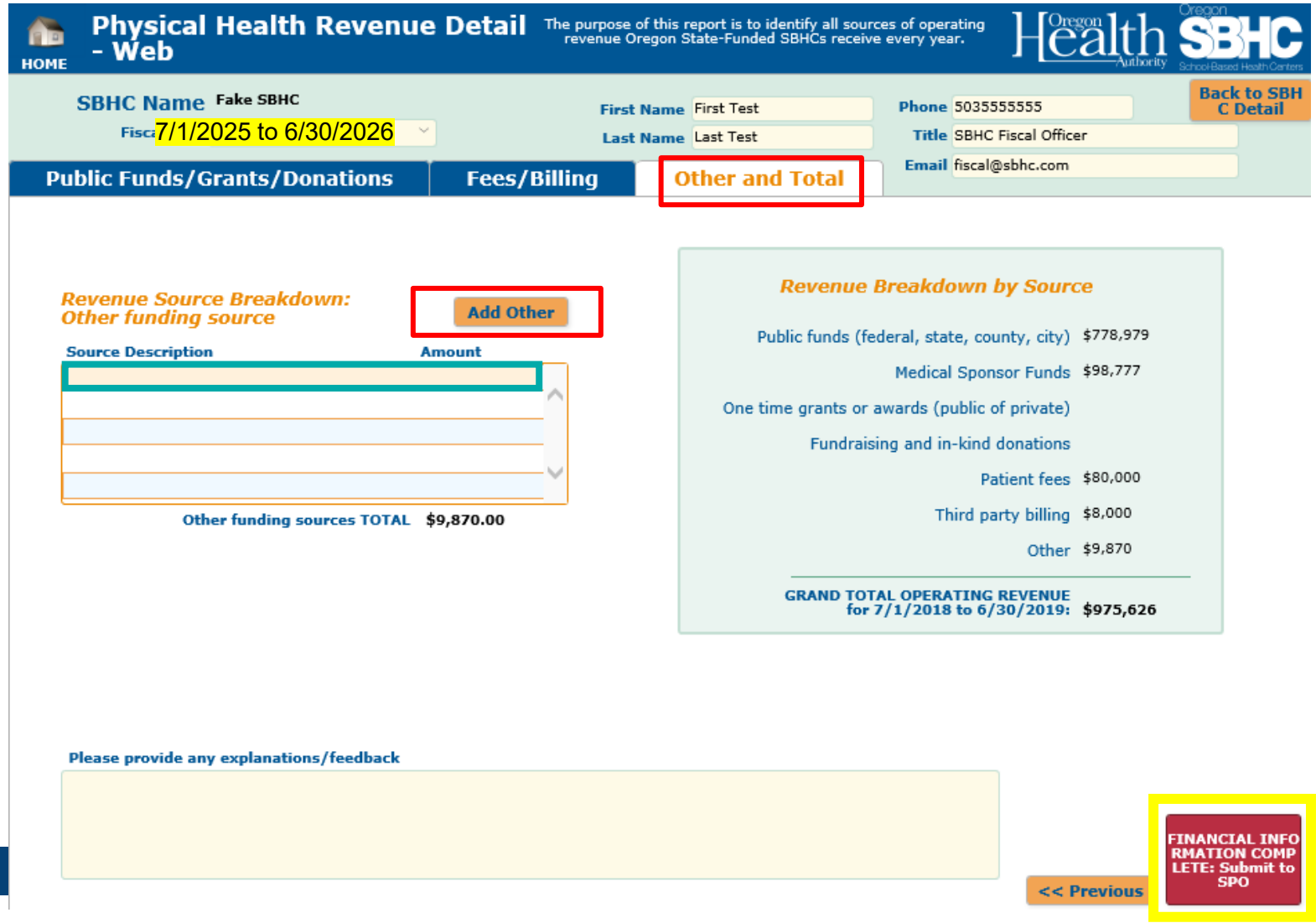
- Entry is for previous fiscal year
- Select 7/1/2025 – 6/30/2026
- Fill-out the Contact Information in case follow-up is needed

PH Revenue Detail tab – Fees/Billing

- When entering billing revenue, it should be total charges minus any adjustments; if this is not possible then enter payments.

PH Revenue Detail tabs – Other and Total

- If there are other funding sources that support physical or oral health services for the SBHC, click the Add Other button and enter the description.
- A new revenue entry can be edited for up to 30 days after it was created if you're unable to complete it all at once.
- Click the button at the bottom right when entry is complete



BH Revenue tab

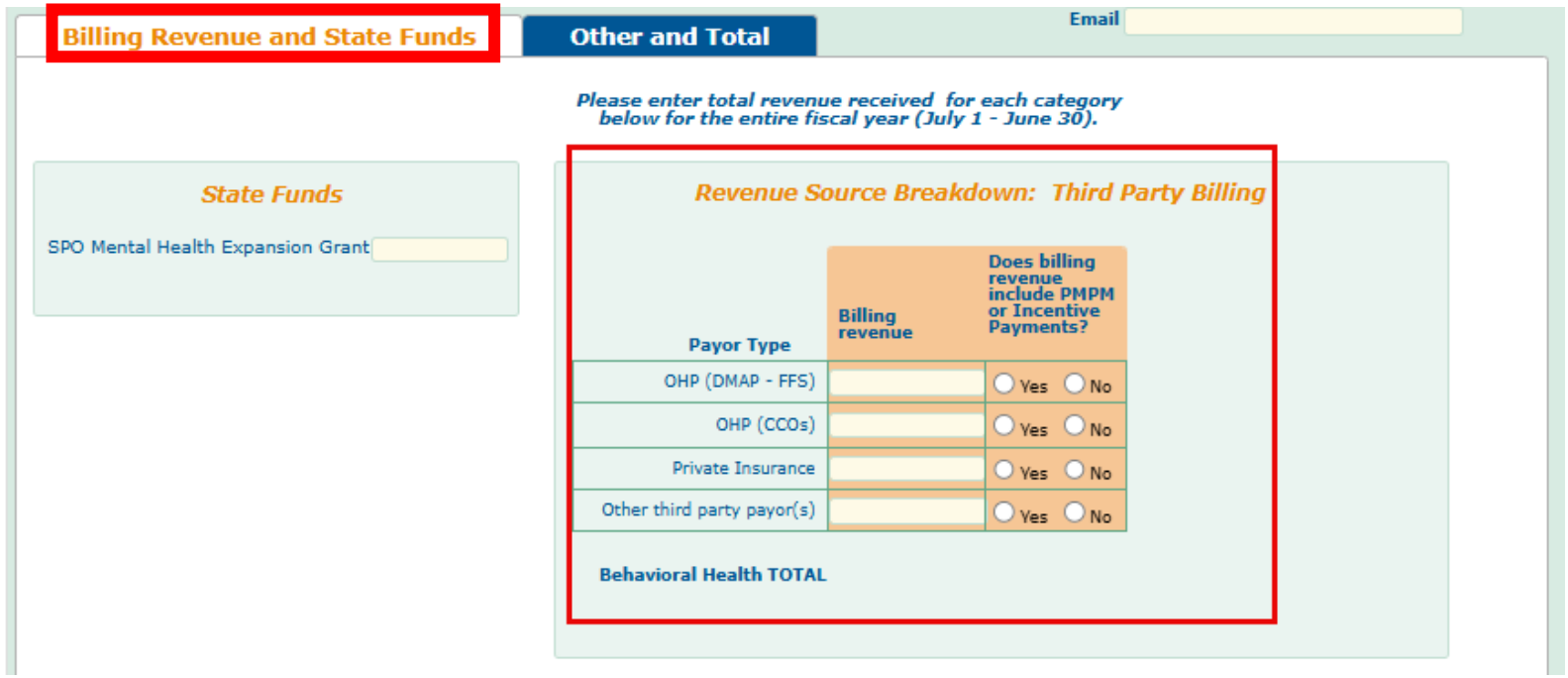
- This tab contains a list of all annual BH revenue entries previously submitted for the SBHC behavioral health services
- To create a new annual revenue entry, click the “Add Annual Rev” button

BH Revenue Detail tab

- Entry is for previous fiscal year
- Select 7/1/2025 – 6/30/2026
- Fill-out the Contact Information if follow-up is needed

BH Revenue tab – Billing Revenue & State Funds

- When entering billing revenue, it should be total charges minus any adjustments; if this is not possible then enter payments.



BH revenue tab – Other and Total

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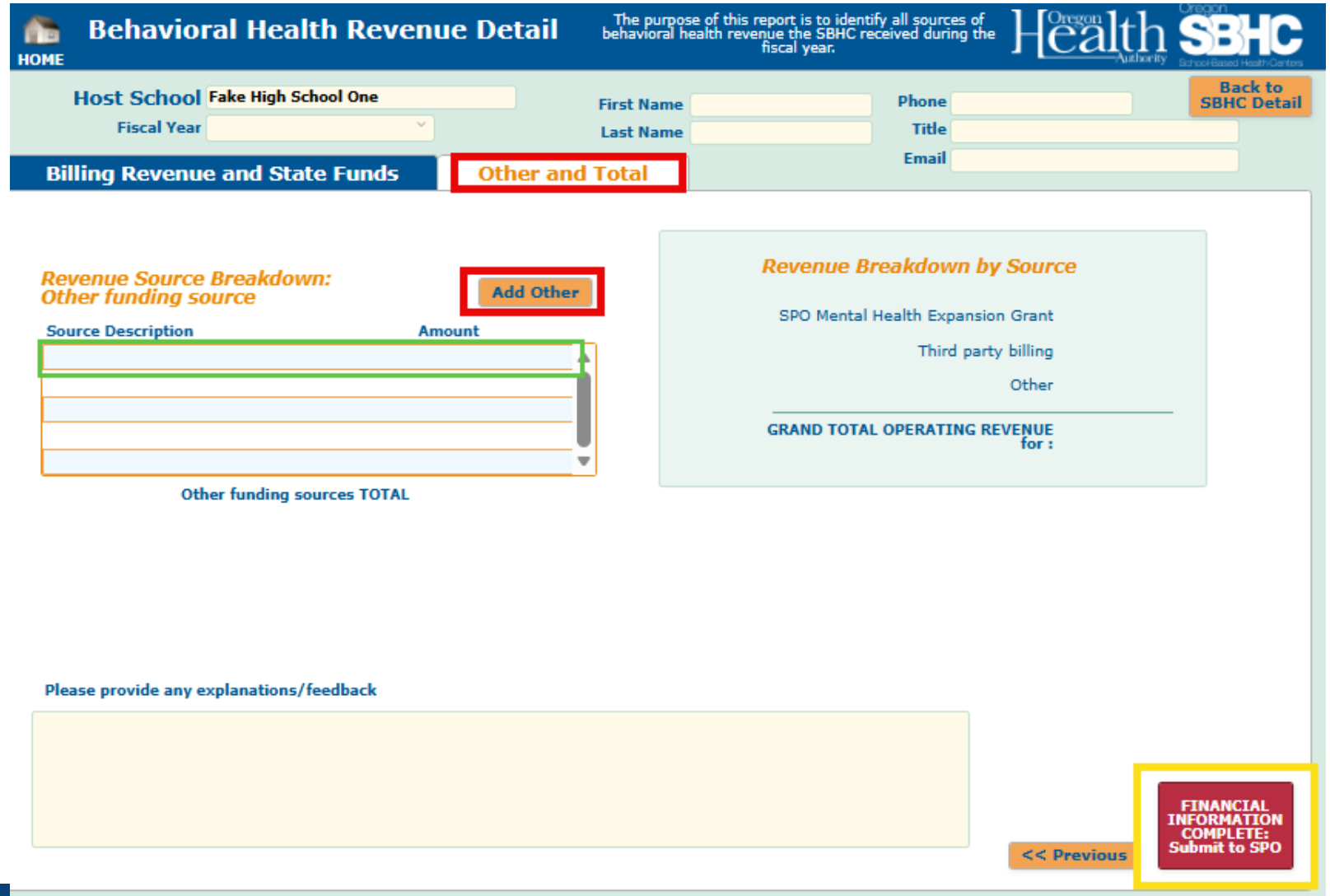

Current or previous service year??

Current year (July 1, 2026 to June 30, 2027):

Information on the following tabs in the database:

SBHC details, operations, hours of operation, staff, shift hours, partner activities entry and contraceptive services entry.

Previous year (July 1, 2025 to June 30, 2026):

Financial revenue entries

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SPO audit review after Fall OP submissions

- Medical sponsor is responsible for Accuracy confirmation boxes located at the bottom of the Details, Operations, Hours of Operation, Staff, and Shift Hour tabs
- Non-compliance of minimum operating hours or staffing
  - Waiver submission required
- Missing partner activities entry
- Missing contraceptive services entry
- Missing financial entries

EEK! How do I get to the database??

Link to access the Operational Profile

FINAL QUESTIONS?

SPO Contact Information

School-Based Health Center Program

Oregon Public Health Division

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Portland, OR 97232

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