School-Based Health Center Program

Implementation Strategies Checklist

This checklist is a resource for partners who have chosen to plan for a new School-Based Health Center (SBHC). It serves as a guide to help those leading the planning effort think through the steps they may want to take during the implementation stage of SBHC planning.

The SBHC implementation stage is an exploratory period in which partners come together to get a certified SBHC up and running at a school site. This stage can be different for each community, depending on local capacity, medical sponsor involvement, and available resources.

The SBHC implementation stage is preceded by the school health services needs assessment stage of planning. Resources for this stage can be found on the Planning for a New School-Based Health Center webpage.

The SBHC Implementation Strategies Checklist and associated resources are drawn from decades of SBHC planning grant experience by the Oregon SBHC State Program Office (SPO) and local Oregon communities. Each section highlights strategies planning communities have used to successfully open a new SBHC. The strategies are not necessarily listed in chronological order; communities can move through these strategies in a way that works best for their local context. Some activities may be ongoing.

Contents

Strategy: Engage and inform the broader community about the proposed SBHC

Community outreach is an important component of your needs assessment, and it continues into the SBHC planning process. Community members are invested in their local schools and, as such, should be involved in the needs assessment and discussions about the development of a new SBHC. There are many ways to ensure your community is informed and has an opportunity to provide feedback about the SBHC planning effort.

- ☐ Ensure all Planning Committee members and School District leadership understand the SBHC model and general implementation process.

- ☐ Use your needs assessment data and conversations with partners to develop clear messaging materials for your Planning Committee to use regarding why you are exploring the SBHC model, what you hope to achieve through this planning effort, and timeline for your planning activities.

- ☐ Have the Planning Committee reach out to the groups identified in your partner analysis to share the needs assessment findings and SBHC implementation plan.

- ☐ Share information about the SBHC planning process with youth and parents/guardians and in community settings (e.g., back to school nights, school board meetings, PTA meetings, social media, etc.).

- ☐ Ensure partners, including youth and parent/guardians, are fully informed about the proposed SBHC and have an opportunity to have their questions answered.

- ☐ Publicize your planning effort in local media outlets (e.g., radio, newspaper, etc.).

- ☐ Create a website or social media page for your planning effort.

- ☐ Establish a plan to evaluate your SBHC planning efforts after the clinic is open (i.e., satisfaction surveys, focus groups, etc.).

☐ Determine how you will share future updates about the SBHC with the school board, parents/guardians, youth, school staff, and other partners.

<u>Resources</u>

- Oregon SBHC Program Website; overview of the SBHC model: https://www.oregon.gov/oha/ph/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/index.aspx
- "SBHC 101" presentation by the SBHC SPO. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/training.aspx.
- "SBHC Orientation" presentation from the SBHC SPO. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/training.aspx
- "Addressing Sensitive topics" from the SBHC SPO. Available by request.
- "Key Responses to School Health Services Questions" from the SBHC SPO. Available by request.
- "Newberg Health Clinic – Community Forum" from Newberg Public Schools. Available at: https://www.youtube.com/watch?v=lQqEzZSGGFA
- "Crisis Communications for School Health Services Messaging" from Advocates for Youth. Available by request.
- "Understanding Minor Consent and Confidentiality in Health Care in Oregon" document. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/Pages/Resources.aspx
- "Sample Media Release" from the SBHC SPO. Available by request.
- "Sample News Article" from the SBHC SPO. Available by request.
- "Collecting Patient Satisfaction Surveys from Adolescents Starter Guide" from the Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/wp-content/uploads/2017/12/collecting-patient-satisfaction-surveys-from-adolescents-starter-guide.pdf

Strategy: Authentically engage youth and parents/guardians in the planning process

Youth and parents/guardians are important players in school-based health care. As primary partners in SBHCs, youth and parents/guardians can offer critical support in SBHC development and service delivery, as well as support for school-based health services. Effective SBHCs recognize the necessity of youth and parent/guardian participation in decision-making processes and engage these groups in various aspects of the health center.

- ☐ Form a Youth Advisory Council (YAC) or Student Health Advisory Committee (SHAC), with an adult ally providing support.

- ☐ Include youth and parent/guardian representatives as part of the SBHC Planning Committee.

- ☐ Ensure youth have a voice in the development of their SBHC model (e.g., location, floorplan, decoration, services, policies, grand opening, etc.).

- ☐ Ensure parents/guardians have a voice in the development of the school's SBHC model (e.g., location, policies, services, grand opening, etc.).

- ☐ Provide opportunities for youth at the school to give ongoing feedback on the SBHC planning effort.

- ☐ Provide continued opportunities for parents/guardians to learn more about the SBHC planning effort and to voice any concerns.

- ☐ If possible, work with youth on a Youth Participatory Action Research (YPAR) project related to the new SBHC (e.g., determining need, assessing school community preferences, etc.). Work with youth to present findings from this project to key decision-makers and integrate recommendations into the SBHC plans.

Resources

- "School-Based Health Center Youth Advisory Council Toolkit" from the Oregon School Based Health Alliance. Available by Request.
- "Creating and Sustaining a Thriving Youth Advisory Council" from the University of Michigan Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/wp-content/uploads/2019/03/yac_manual-2019_10.pdf
- "Youth Participatory Action Research Curriculum" adapted for Oregon by the Institute for Community Research. Available at: http://public.health.oregon.gov/HealthyPeopleFamilies/Youth/Documents/CurriculumYPAR2014.pdf
- "Collecting Patient Satisfaction Surveys from Adolescents Starter Guide" from the Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/wp-content/uploads/2017/12/collecting-patient-satisfaction-surveys-from-adolescents-starter-guide.pdf
- "Parent/Caregiver Engagement" information from Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/improving-care/parent-engagement/
- "Key Responses to School Health Services Questions" from the SBHC SPO. Available by request.
- "Newberg Health Clinic – Community Forum" from Newberg Public Schools. Available at: https://www.youtube.com/watch?v=lQqEzZSGGFA
- "Youth Empowerment" resources from the University of Michigan Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/improving-care/youth-empowerment/
- "Tips for Adults When Working with Youth Leaders" from Advocates for Youth. Available at: https://www.advocatesforyouth.org/wp-content/uploads/2022/06/Final_AFY_TipsForWorking_WithAdults-2022.pdf

Strategy: Identify a medical sponsor early in the process

All certified SBHCs in Oregon must be sponsored by a medical entity able to meet the requirements outlined in the [SBHC SPO Standards for Certification](). This entity could be a Local Public Health Authority (LPHA), local provider, Federally Qualified Health Center (FQHC), Rural Health Clinic (RHC), or hospital. Because so many aspects of SBHC operations (staffing, funding, clinic set-up, etc.) are determined by the medical sponsor, it is helpful to identify this entity as early in the planning process as possible.

☐ Identify and meet with local medical entities (e.g., LPHA, FQHC, local providers, etc.) about the development of your SBHC.

☐ Ensure these potential medical sponsors understand the SBHC model and are committed to the community's goals/vision for the SBHC.

☐ Identify a medical sponsor or, if needed, initiate a Medical Sponsor Request for Proposals (RFP) process, and formalize this relationship in a written agreement between SBHC partners, describing roles and responsibilities in SBHC operations (e.g., MOU, IGA, etc.).

☐ Ensure the Planning Committee and/or medical sponsor meet with other local health care providers, such as primary care, dental, or behavioral health providers to discuss how the SBHC can coordinate patient care.

<u>Resources</u>

- "SBHC Orientation" from the Oregon SBHC SPO. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/training.aspx One on one training available by request.
- "School-Based Health Services Primary Care Features and Benefits" from the National School-Based Health Alliance. Available by request.
- "Navigating the Promise of School-Based Health Centers – A Guide for Health Care Leaders" from the California School-Based Health Alliance. Available at: https://www.schoolhealthcenters.org/wp-content/uploads/2022/10/Navigating-the-Promise-of-SBHCs.pdf

- Sample medical sponsor RFP. Available by request.
- "SBHC-PCP Partnerships to Create an 'Expanded Medical Home'" from the Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/wp-content/uploads/2020/08/sbhc-pcp-partnerships-starter-guide.pdf

Strategy: Select a location for the SBHC

The State Program Office SBHC Standards for Certification outline the requirements for each Oregon certified SBHC. You can find the most updated standards at www.healthoregon.org/sbhc. The priority for selecting a SBHC site location should always be to maximize and sustain student access to preventive, physical, and behavioral health services. Successfully meeting this goal requires balancing a number of different considerations, particularly feasibility and cost. Work with your Planning Committee, particularly the sponsoring agency/medical sponsor who will be working in the space, to think through this strategy.

☐ Contact other currently certified SBHCs to see if you can do a site visit. Ask if you can bring members of your Planning Committee or other interested parties. Visit more than one to see a variety of SBHC models and location strategies.

☐ Use your needs assessment data and conversations with partners to identify the appropriate location for the SBHC.

☐ Evaluate this location for its suitability to host a SBHC (see resources for more information).

☐ Evaluate this location for its suitability to be a youth friendly clinical space (see youth-friendly clinical space strategy for more information).

☐ Work with partners to secure approval through the appropriate procedures (e.g., school board vote) for chosen SBHC location.

☐ Begin conversations with partners about the policies and minimum service requirements that will be required if the SBHC is sited at this location (e.g., Consent for Services policy, Access policies, etc.).

<u>Resources</u>

- Contact information and recommendations for connecting with Oregon certified SBHCs are available upon request.
- Oregon SBHC Standards for Certification. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Documents/SBHC%20Certification/SBHCstandardsforcertificationV4.pdf
- "School Health Centers" from the National Clearinghouse for Educational Facilities. Available at: https://files.eric.ed.gov/fulltext/ED512689.pdf
- "Youth-Friendly Services Starter Guide" from Advocates for Youth. Available at: https://umhs-adolescenthealth.org/wp-content/uploads/2020/08/youth-friendly-services-starter-guide-2.pdf

Strategy: Develop a SBHC business plan with your sponsoring agency/medical sponsor

Ensuring the financial viability of your SBHC is essential for its long-term success. Sustainability does not occur in a vacuum; while working closely with your sponsoring agency/medical sponsor to create your business plan, you should also look at the big picture of your SBHC operations. What services will your medical sponsor provide? How will clients access your center? Who are you partnering with? Also consider some of the systems your SBHC medical sponsor will need to have in place, such as billing. Draw on some of the decisions and considerations the Planning Committee has made earlier in the planning process as you examine your financial outlook.

☐ Create a business plan for at least 3 years of SBHC operations.

☐ Ensure the business plan creates a pathway for the SBHC to become self-sustaining, while being flexible enough to change with external forces.

☐ Solicit grant funding from local, state, and national public and private sources. Solicit funding to support the "implementation" stage as well as continued operational funding in future years.

<u>Resources</u>

- "Business Plan Template" from the National School-Based Health Alliance. Available by request.
- "SBHC Business Plan Sample Outline." Available by request.
- "SBHC Pro-Forma Business Plan" from the National School-Based Health Alliance. Available by request.
- Oregon Primary Care Association. http://www.orpca.org/

Strategy: Maximize resources for SBHC construction

Oregon SBHCs vary considerably in size, design, and capacity. Certified SBHCs are required to meet the minimum facility requirements outlined in the Standards for Certification. A floorplan of the SBHC is a required part of a SBHC certification application. It is best to contact the SBHC SPO early if you have questions about the proposed SBHC design's suitability with regards to the Standards. Each locality has different regulations related to the process for school facility construction or renovation (e.g., open bid process, etc.). Check with your school district facilities staff early on to familiarize yourself with these requirements. Construction almost always takes longer than initially anticipated.

☐ Seek additional funding, if necessary, to support construction costs.

☐ Review proposed floor plan with Planning Committee, youth, and partners to ensure it meets youth and partners' needs and supports the joint vision for the SBHC.

☐ Ensure clinic space design promotes the comfort, confidentiality, and privacy of youth clients (see "Ensure clinic space is youth friendly" strategy, below).

☐ Follow required local processes for selecting contractor(s).

☐ Obtain required local permits (e.g., city, county, etc.).

☐ Designate point person to monitor construction timeline and progress.

Resources

- Sample SBHC floor plans. Available by request.
- Contact information and recommendations for connecting with Oregon certified SBHCs are available upon request.
- "School Health Centers" from the National Clearinghouse for Educational Facilities. Available at: https://files.eric.ed.gov/fulltext/ED512689.pdf

Strategy: Develop a collaborative partnership between the school and SBHC

Strong partnerships are key to the utilization and sustainability of an SBHC. School staff, educators, nurses, counselors, social workers, administrators, and others can work closely with SBHC providers and staff to solidify a close partnership to support the health and wellness of youth. Challenges for collaboration might include school and SBHC staff turnover, logistics with helping youth access the SBHC, operating under complex HIPAA/FERPA laws, and varying understandings of SBHC service. A successful partnership between the school and SBHC requires deliberate collaboration and thoughtful planning.

☐ Work with key school and SBHC partners to develop written roles and position specific responsibilities in school wellness.

☐ Establish an SBHC point person to liaison and partner with key school staff (i.e., superintendent, school board, school principal, school/district nurse, school office staff, athletic director and coaches, teachers, school counselors, attendance office, etc.).

☐ Establish a school point person to liaison and partner with key SBHC staff (i.e., clinic manager, SBHC administrative staff, etc.).

☐ Participate in school events and initiatives such as parent/caregiver teacher nights, sporting events, open houses, school board meetings, etc.

☐ Schedule regular meetings between SBHC and school staff and leadership.

☐ Develop written roles and a collaborative plan for handling urgent and non-urgent student health needs.

- ☐ Create opportunities for active teacher and staff support such as an annual SBHC orientation, attending school meetings (e.g., school safety, care team meetings, attendance focused meetings; all with appropriate HIPAA/FERPA release of information forms completed if student/patient specific discussions), and inviting staff/teachers to participate on an SBHC advisory board.

- ☐ Collaborate with the school to create tools and mechanisms to ensure teachers, administrators, and school staff know how to support student access to SBHC services (SBHC/school website, teacher/staff/nurse cheat-sheet, classroom presentations, SBHC tours, teacher/staff meeting updates, etc.)

- ☐ Establish mechanisms for feedback through surveys for school staff, teachers, school health services providers (nurses, counselors, speech language pathologists, etc.), and school administrators.

- ☐ Establish an SBHC Youth Advisory Council (YAC) to support youth development and foster a deeper partnership between the school and SBHC.

- ☐ Create a plan to assess school/SBHC collaboration strengths and areas for improvement.

<u>Resources</u>

- "SBHC and School Collaboration Starter Guide" from Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/wp-content/uploads/2020/08/sbhc-school-collaboration-starter-guide-1.pdf
- Partner Collaboration information for school integration from the California School-Based Health Alliance. Available at: https://www.schoolhealthcenters.org/resources/start-an-sbhc/partner-collaboration/
- "School-Based Health Center Youth Advisory Council Toolkit" from the Oregon School-Based Health Alliance. Available by Request.
- "Creating and Sustaining a Thriving Youth Advisory Council" from the University of Michigan Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/wp-content/uploads/2019/03/yac_manual-2019_10.pdf

- "SBHC/School Integration Self-Assessment" from the California School-Based Health Alliance. Available at: https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.schoolhealthcenters.org%2Fwp-content%2Fuploads%2F2012%2F08%2FIntegration-Self-Assessment.docx&wdOrigin=BROWSELINK
- "Information Sharing and Confidentiality Protection in School-Based Health Centers – A Resource Guide to HIPAA and FERPA" from the School Based Health Alliance. Available at: https://www.sbh4all.org/wp-content/uploads/2023/06/Resource-Guide-to-HIPAA-FERPA-06-26-23.pdf

Strategy: Develop a marketing plan

Marketing your SBHC is essential for its long-term sustainability. The school and broader community should be engaged as part of your needs assessment and informed of your assessment results/recommendations. However, the implementation stage is the time for the Planning Committee and other partners to begin to promote the SBHC among potential clients. There are many creative marketing strategies you can employ via print, radio, and online media. You should continue to promote the SBHC on an ongoing basis, as new students and families become part of the school community each year.

☐ In partnership with your school, develop a marketing plan utilizing information gathered during your needs assessment and through conversations with youth and other partners (see below for marketing resources).

☐ Reach out to school principal and teachers (marketing, health sciences, etc.) to see if it would be feasible to have an SBHC marketing project as part of classroom instruction.

☐ Engage students at the school in the development of marketing strategies and materials.

☐ Set up SBHC website with general information to minimize need for frequent updates. Ensure website is linked to appropriate partner websites,

such as school, medical sponsor, LPHA, etc. Ensure information about the SBHC is designed for youth.

☐ Set marketing goals for immediate and long-term timeframes.

☐ Evaluate success of marketing campaign. Apply lessons learned as you continue to adjust your SBHC marketing and outreach efforts.

☐ Ensure SBHC has easy to see signage, both at the SBHC itself and around the school building. Signage should also clearly advertise hours of operation and ways to obtain care outside of SBHC operating hours. Include signage in multiple languages to reflect the language preferences of SBHC clients and school community.

☐ Schedule SBHC outreach activities such as SBHC open houses, SBHC tours, and information booths at back-to-school nights, student orientation, parent/guardian night, sporting events, health fairs, etc.

☐ Evaluate success of marketing campaign. Apply lessons learned as you continue to adjust your SBHC marketing and outreach efforts.

Resources

- "SBHC-School Collaboration" by the Adolescent Health Initiative. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Documents/SBHC%20Webinars/SBHC-School_Collaboration_Starter_Guide.pdf
- Sample SBHC marketing tools, available by request.
- Beaverton High School School-Based Health Center Promo from Virginia Garcia Memorial Health Center and the Beaverton High School Business/Marketing class. Available at: https://www.youtube.com/watch?v=97jjZAaL3ns
- 'Marketing and Promotion' webpage from the New Mexico Alliance for School-Based Health. Available at: https://www.nmasbhc.org/our-work/technical-assistance/marketing-and-promotion/

Strategy: Establish clinical services and referral sources

The clinical services offered in your SBHC will be determined by a number of factors, including the needs of your client base, medical sponsor capacity, local medical partners, and clinic space, among others. All certified SBHCs in Oregon must provide the minimum services outlined in the SBHC Standards for Certification. Services provided onsite or via referral beyond these minimum requirements can be determined by the Planning Committee and community. Certified SBHCs should also work to maximize their ability to bill and be reimbursed for services provided in order to enhance the SBHC's sustainability.

☐ Work with your medical sponsor and/or an outside agency to understands the various models, staffing types, and billing options for SBHC services.

☐ Work with your medical sponsor to develop a clinical service model focused on meeting the needs of your youth populations.

☐ Work with other local medical providers (behavioral health, dental, etc.), if necessary, and other school health service providers (school nurses, school counselors, etc.) to build an integrated, collaborative referral system of care for SBHC clients. Ensure all partners are committed to a common vision for the SBHC and client care.

☐ Determine if your SBHC will apply to be an Oregon Patient Centered Primary Care Home (PCPCH) and, if so, plan for your clinic to meet Oregon PCPCH requirements.

☐ Develop the necessary agreements and procedures to bill commercial and public insurance for SBHC services.

☐ Formalize local medical partnerships in writing (e.g., MOU, IGA, etc.).

☐ Develop a structure, such as a SBHC Advisory Council, to provide continued oversight of SBHC operations and a forum for SBHC partners to continue to meet.

Resources

• Oregon SBHC Standards for Certification. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALT

HSCHOOL/SCHOOLBASEDHEALTHCENTERS/Documents/SBHC%20Certificati on/SBHCstandardsforcertificationV4.pdf

- Oregon Primary Care Association. http://www.orpca.org/
- American Academy of Pediatrics Bright Futures. https://brightfutures.aap.org
- Oregon PCPCH Program. http://www.oregon.gov/oha/pcpch/Pages/index.aspx.
- "Behavioral and Mental Health Service Provision in SBHCs" by the SBHC SPO. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALT HSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/training.aspx
- "National Standards for Culturally and Linguistically Appropriate Services (CLAS) in Health and Health Care" from the U.S. Department of Health and Human Services Office of Minority Health. Available at: https://thinkculturalhealth.hhs.gov/assets/pdfs/EnhancedNationalCLASSta ndards.pdf
- "An Implementation Checklist for the National CLAS Standards" from the U.S. Department of Health and Human Services Office of Minority Health. Available at: https://thinkculturalhealth.hhs.gov/assets/pdfs/AnImplementationChecklis tfortheNationalCLASStandards.pdf
- "The Intersection of Primary Care and Public Health through Oral Health Services for Students," from the National School-Based Health Alliance. Available at: http://www.sbh4all.org/events/the-intersection-of-primary- care-and-public-health-through-oral-health-services-for-students/
- "Building Dental Practice Capacity to Serve Adolescent Patients Starter Guide" from Advocates for Youth. Available at: https://umhs- adolescenthealth.org/wp-content/uploads/2020/08/building-dental- practice-capacity-starter-guide-1.pdf

Strategy: Establish behavioral health services or referral sources

SBHCs can be a vital access point to support youth and families' behavioral health needs through a range of promotion, prevention, and treatment services. The

term Behavioral Health is used in this document to encompass mental health, behavioral health and substance use services. While there are specific models of integrated behavioral health care, the checklist is an overview of considerations when deciding on how to approach integrating behavioral health services into your SBHC.

- ☐ Work with your medical sponsor and/or an outside agency to understands the various models, staffing types, and billing options for behavioral health services.

- ☐ Utilize your needs assessment results to determine what model best meets the needs of youth in your community, including opportunities to provider culturally and linguistically appropriate services.

- ☐ If the medical sponsor will be contracting with a separate agency for behavioral health services, establish a written agreement with specific language outlining partner roles and expectations.

- ☐ Identify funding streams to cover costs associated with providing behavioral health services.

- ☐ Assure there is a comfortable and confidential space for a behavioral health provider to use in the SBHC.

- ☐ Create clear written policies on the role / scope of the behavioral health provider(s) in your SBHC in partnership with host school staff. Some examples of roles could include individual, group, or family therapy; brief interventions and referrals; suicide screening, assessment, and safety planning; crisis intervention for SBHC clients or all students; school wide or classroom specific prevention and education; participation in WRAP meetings, IEP / 504 meetings; diversion for disciplinary matters related to substance use; consultation with teachers and school staff.

- ☐ Create clear written policies on the role/scope of the behavioral health provider(s) in your SBHC in partnership with the physical and behavioral health providers in your clinic. Some examples could include referral workflows, checking to see if Well Child Care visits are due, and offering other SBHC services as appropriate.

☐ Determine mechanisms to collect ongoing feedback from students (i.e., feedback informed treatment, anonymous feedback mechanism / surveys, youth advisory councils or student feedback session, etc.).

☐ Include additional community resources or behavioral health contacts such as 988, warmlines, culturally specific crisis line, etc. in marketing materials.

☐ Establish the SBHC's role in supporting Department of Education requirements such as Adi's Act as well as statewide, county or community initiatives such as Mobile Response and Stabilization Service.

Resources

- "Behavioral and Mental Health Service Provision in SBHCs" by the SBHC SPO. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/training.aspx

- "SBHC Integrated Behavioral Health Starter Guide" from the Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/wp-content/uploads/2022/06/sbhc-integrated-behavioral-health-starter-guide-spring-2022-update.pdf

- "The Comprehensive Healthcare Integration Framework" from the National Council for Mental Wellbeing. Available at: https://www.thenationalcouncil.org/wp-content/uploads/2022/04/04.22.2022_MDI-CHI-Paper_Reduced.pdf

- "Center of Excellence for Integrated Health Solutions Featured Resources" from the National Council for Mental Wellbeing. Available at: https://www.thenationalcouncil.org/program/center-of-excellence/resources/

- "Investing in Culturally and Linguistically Responsive Behavioral Health Care in Oregon" from the Coalition of Communities of Color. Available at: https://www.coalitioncommunitiescolor.org/2021-bh-report

- "National Standards for Culturally and Linguistically Appropriate Services (CLAS) in Health and Health Care" from the U.S. Department of Health and Human Services Office of Minority Health. Available at:

https://thinkculturalhealth.hhs.gov/assets/pdfs/EnhancedNationalCLASSta ndards.pdf

- "An Implementation Checklist for the National CLAS Standards" from the U.S. Department of Health and Human Services Office of Minority Health. Available at:
https://thinkculturalhealth.hhs.gov/assets/pdfs/AnImplementationChecklis tfortheNationalCLASStandards.pdf
- "OHP Fee-For-Service Behavioral Health Fee Schedule" from the Oregon Health Authority. Available at:
https://www.oregon.gov/oha/HSD/OHP/Tools/BH-Fee-Schedule-Fact-Sheet.pdf
- "Suicide Prevention, Intervention, Postvention (Adi's Act)" information from the Oregon Department of Education. Available at:
https://www.oregon.gov/ode/students-and-family/equity/SchoolSafety/Pages/Safe_and_Inclusive_Schools.aspx#:~:text =ODE%20believes%20that%20mental%20health,identity%2C%20diversity% 2C%20and%20purpose.&text=If%20you%20or%20someone%20you,or%20c hat%20at%20988lifeline.org.
- "Behavioral Health Crisis Response System and 988" information from the Oregon Health Authority. Available at:
https://www.oregon.gov/oha/hsd/amh/pages/988.aspx
- Oregon SBHC Standards for Certification. Available at:
https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALT HSCHOOL/SCHOOLBASEDHEALTHCENTERS/Documents/SBHC%20Certificati on/SBHCstandardsforcertificationV4.pdf

Strategy: Determine appropriate staffing

Your SBHC staffing plan will be determined by a number of factors, including the needs of your client base, medical sponsor capacity, local medical partners, clinic space, and desired service provisions, among others. All certified SBHCs in Oregon must meet the minimum staffing requirements outlined in the SBHC Standards for Certification. SBHC staffing hours beyond these minimum requirements can be determined by the Planning Committee, medical sponsor, and community.

- ☐ Revisit the data gathered during your needs assessment to determine types of providers and services necessary to meet client needs.

- ☐ Ensure proposed staffing plan meets minimum service requirements outlined in the SBHC Standards for Certification, including administrative staff and provider time.

- ☐ If medical sponsor is unable to provide certain types of services (e.g., dental health services or behavioral health services beyond required on-site services such as assessments and screenings) seek partnerships with local providers who may be able to offer services onsite at the SBHC, at least on a part-time basis.

- ☐ Determine balance of provider and service levels with ability to sustain staffing through your funding sources (i.e., grant funding, school district funding, and public/private insurance reimbursement).

- ☐ Recruit providers with training, background, and desire to work with the youth populations you will be serving.

- ☐ If necessary, explore potential provider recruitment strategies with medical sponsor and partners.

- ☐ If necessary, initiate relationship with Office of Rural Health to become an approved practice site to host Primary Health Care Loan Forgiveness Program or Repayment applicants.

Resources

- Oregon SBHC Standards for Certification. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Documents/SBHC%20Certification/SBHCstandardsforcertificationV4.pdf
- Adolescent Health Initiative – Youth Friendly Care. https://umhs-adolescenthealth.org/improving-care/youth-friendly-care/
- "Creating Safer Spaces for LGBTQ Youth: A Toolkit for Education, Healthcare, and Community-Based Organizations" from Advocates for Youth. Available at:

https://www.advocatesforyouth.org/resources/curricula-education/creating-safer-spaces-for-lgbtq-youth/

- "National Standards for Culturally and Linguistically Appropriate Services (CLAS) in Health and Health Care" from the U.S. Department of Health and Human Services Office of Minority Health. Available at: https://thinkculturalhealth.hhs.gov/assets/pdfs/EnhancedNationalCLASStandards.pdf
- "An Implementation Checklist for the National CLAS Standards" from the U.S. Department of Health and Human Services Office of Minority Health. Available at: https://thinkculturalhealth.hhs.gov/assets/pdfs/AnImplementationChecklistfortheNationalCLASStandards.pdf
- Oregon Office of Rural Health – Provider Incentive Programs. https://www.ohsu.edu/oregon-office-of-rural-health/provider-incentive-programs
- HRSA Loan Repayment. http://www.hrsa.gov/loanscholarships/repayment/nursing/

Strategy: Develop policies that promote clinical quality

The SBHC SPO requires certain policies for all certified SBHCs. Policies are written by the medical sponsor or SBHC partners. They should be SBHC-specific and be drafted with participation from the Planning Committee, school district, and/or partners.

☐ Develop policies specific to the SBHC and the population it will serve.

☐ Involve youth and parents/guardians in policy development, when appropriate.

☐ Obtain feedback from the Planning Committee and other partners on draft policies to ensure they support the joint vision for the SBHC.

☐ Review relevant state and federal laws related to minor consent, Health Insurance Portability and Accountability Act (HIPAA) and Family Educational Rights and Privacy Act (FERPA). Work with key medical sponsor and school

staff to develop a plan for navigating HIPPA and FERPA laws to support student care workflows.

☐ Develop written policies, procedures, and necessary forms to support clinical referrals and information sharing among partner agencies (i.e., school district, medical sponsor, LPHA, dental/behavioral health partners, etc.).

☐ Ask medical or school legal counsel to review policies, if necessary.

☐ Send draft policies to the SBHC SPO Certification Team for feedback, if desired.

☐ Ensure policies are signed and dated by the appropriate signatory within the medical sponsor organization.

Resources

- Example policies and procedures available by request.
- "Confidentiality" from Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/improving-care/confidentiality/
- "Understanding Minor Consent and Confidentiality in Health Care in Oregon" document. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/Pages/Resources.aspx
- "HIPAA/FERPA 101" from Building Healthy Futures and Baird Holm, LLP. Available at: https://www.youtube.com/watch?v=OvMZQZ-Rzec
- "Health Information & Privacy: FERPA and HIPAA" from the Centers for Disease Control and Prevention. Available at: https://www.cdc.gov/phlp/publications/topic/healthinformationprivacy.html
- "HIPAA + FERPA Key Considerations for School-Based Health Centers" infographic from the School Based Health Alliance. Available at: https://www.sbh4all.org/wp-content/uploads/2023/07/A5_SBHA-HIPAA-FERPA-Infographic-Handout.pdf
- "Information Sharing and Confidentiality Protection in School-Based Health Centers – A Resource Guide to HIPAA and FERPA" from the School Based

Health Alliance. Available at: https://www.sbh4all.org/wp-content/uploads/2023/06/Resource-Guide-to-HIPAA-FERPA-06-26-23.pdf

- "School Based Health Centers, school nurses, and the applicability of HIPAA and FERPA" from the Oregon Department of Justice. Available at: https://www.oregon.gov/ode/students-and-family/healthsafety/Documents/hippaferpaadvice.pdf

- "FAQ related to nursing service documentation and privacy" from the Oregon Department of Education. Available at: https://www.oregon.gov/ode/students-and-family/Documents/School%20nurse%20guidance%20on%20FERPA%20and%20HIPAA.docx.pdf

- "National Standards for Culturally and Linguistically Appropriate Services (CLAS) in Health and Health Care" from the U.S. Department of Health and Human Services Office of Minority Health. Available at: https://thinkculturalhealth.hhs.gov/assets/pdfs/EnhancedNationalCLASStandards.pdf

- "An Implementation Checklist for the National CLAS Standards" from the U.S. Department of Health and Human Services Office of Minority Health. Available at: https://thinkculturalhealth.hhs.gov/assets/pdfs/AnImplementationChecklistfortheNationalCLASStandards.pdf

Strategy: Ensure the clinic space is youth-friendly

SBHCs provide healthcare for youth who may not otherwise have access to care. That's why it's important to ensure that youth feel comfortable utilizing their SBHC. Making a space youth-friendly does not just involve painting the clinic space bright colors (although that can help). It also involves looking at your clinic policies, providers, services, and workflows to make your clinic accessible for youth clients.

☐ Talk with youth about what "youth-friendly services" means to them.

☐ Ensure the clinic has thoughtful policies and workflows in place related to clinic access, confidential services, referrals, and consent.

☐ Ensure providers have training and background working with youth. If needed, support providers and staff by connecting them with training opportunities and appropriate resources (i.e., youth-friendly clinical care, gender affirming care, etc.).

☐ Ensure clinic space is designed to protect client privacy and confidentiality (e.g., appropriate sound and sight proofing is in place).

☐ Ensure clinic policies encourage parent/guardian involvement, when appropriate.

☐ Ensure clinic is decorated (artwork, paint colors, furniture, etc.) with input from the youth who will use it. The space should be comfortable and welcoming for youth clients.

☐ Evaluate your efforts through patient satisfaction surveys and/or client focus groups once the clinic is open.

<u>Resources</u>

- "Characteristics of Youth-Friendly Clinical Services" from the Healthy Teen Network. Available at: https://www.healthyteennetwork.org/resources/characteristics-youth-friendly-clinical-services/
- "Youth-Friendly Materials" from the Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/improving-care/health-center-materials/
- "Youth-Friendly Care" from the Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/improving-care/youth-friendly-care/
- "Making health services adolescent friendly" from the World Health Organization. Available at: http://apps.who.int/iris/bitstream/10665/75217/1/9789241503594_eng.pdf
- "Best Practices for Youth Friendly Sexual and Reproductive Health Services in Schools" from Advocates for Youth. Available at: https://advocatesforyouth.org/wp-content/uploads/storage/advfy/documents/bp-youth-friendly-services.pdf

- "Creating Safer Spaces for LGBTQ Youth: A Toolkit for Education, Healthcare, and Community-Based Organizations" from Advocates for Youth. Available at: https://www.advocatesforyouth.org/resources/curricula-education/creating-safer-spaces-for-lgbtq-youth/
- "Checklist for Creating Safe and Inclusive Environments for LGBTQ Youth" from Project Thrive. Available at: https://hrc-prod-requests.s3-us-west-2.amazonaws.com/ProjectThrive_YRBSData_Checklist_122120.pdf?mtime=20210104125146&focal=none
- "Drawing a Picture: Adolescent Centered Medical Homes" from the University of Michigan Adolescent Health Initiative's Teen Advisory Council. Available at: https://www.youtube.com/watch?v=vAu5ad827I8&feature=youtu.be
- Society for Adolescent Health and Medicine THRIVE app for parents/guardians of teens and young adults. Available at: https://www.adolescenthealth.org/About-SAHM/Healthy-Student-App-Info.aspx
- "Collecting Patient Satisfaction Surveys from Adolescents Starter Guide" from the Adolescent Health Initiative. Available at: https://umhs-adolescenthealth.org/wp-content/uploads/2017/12/collecting-patient-satisfaction-surveys-from-adolescents-starter-guide.pdf

Strategy: Ensure clinic has appropriate supplies and authorizations for daily operations

The SBHC medical sponsor and partners should work to ensure the SBHC has appropriate supplies for daily operations. If the medical sponsor does not have sufficient resources to purchase and/or donate supplies for the SBHC, you can reach out to other local health systems or providers to see if they would be willing to donate surplus supplies or equipment. The medical sponsor will need to apply for any licenses, certificates, or recognitions, as applicable, including such as: Vaccine for Children's Program, Oregon State Public Health Laboratory Compliance (CLIA), Oregon Board of Pharmacy, Oregon Reproductive Health Program.

- ☐ Purchase appropriate equipment and supplies to provide comprehensive pediatric care for SBHC clients.

- ☐ Enroll the SBHC in the Oregon Vaccines for Children (VFC) program.

- ☐ Obtain an Oregon Clinical Laboratory Improvements Amendments (CLIA) certificate appropriate for the SBHC lab.

- ☐ Obtain a registration with the Oregon Board of Pharmacy for medication dispensing, if applicable.

- ☐ Obtain certification from RHCare (Oregon Reproductive Health Program) for support providing reproductive health services, if applicable.

Resources

- Oregon VFC Enrollment Information. Available at: http://public.health.oregon.gov/PreventionWellness/VaccinesImmunization/ImmunizationProviderResources/vfc/Pages/enroll.aspx
- "Ready? Set? Test!" from the Centers for Disease Control. Available at: http://wwwn.cdc.gov/clia/resources/waivedtests/pdf/readysettestbooklet.pdf
- Oregon Clinical Laboratory Regulations. Available at: http://public.health.oregon.gov/LaboratoryServices/ClinicalLaboratoryRegulation/Pages/index.aspx
- Oregon Board of Pharmacy information. Available at: https://www.oregon.gov/pharmacy/Pages/index.aspx
- "Reproductive Health Provider Resources" from the Oregon Reproductive Health Program (RHCare). Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/REPRODUCTIVESEXUALHEALTH/RESOURCES/Pages/Certification.aspx

Strategy: Ensure appropriate data and billing capabilities are in place

Information sharing and billing are critical to SBHC sustainability and patient care; it is important to work with the medical sponsor, partners, and State and Federal agencies to ensure the appropriate data and billing capabilities are in place before the SBHC opens.

- ☐ Review data collection/reporting and billing requirements in the SBHC SPO Standards for Certification and ensure the SBHC can meet all the data requirements for certification.

- ☐ If multiple partners (behavioral health, dental, physical heath) are providing care at the SBHC, determine policies, workflows, and agreements for sharing information between providers.

- ☐ Ensure electronic health record system(s) have the capability to securely submit required encounter data to SBHC SPO (including physical health, behavioral health, and dental health).

- ☐ If the SBHC is an OCHIN user, complete required process that allows OCHIN to automatically submit encounter data to the SBHC SPO.

- ☐ If the SBHC will not use OCHIN, work with your billing specialists to make sure the procedure code modifier "UB" is added to all Oregon Health Plan clients.

- ☐ Learn about the SBHC SPO online SBHC Operational Profile and prepare to complete the requirement during the certification process.

- ☐ Learn about SBHC SPO satisfaction survey requirement and begin developing a plan to administer the annual SBHC SPO satisfaction survey via iPad.

- ☐ Learn about SBHC SPO key performance measure chart audit requirement and begin developing a plan to complete annual chart review, when applicable.

- ☐ Work with your medical sponsor and/or an outside agency to understand the various billing options for services in your SBHC.

- ☐ Develop the necessary agreements and procedures to bill commercial and public insurance for SBHC services.

- ☐ Ensure SBHC healthcare providers are enrolled and able to bill Medicaid.

- ☐ Develop systems to track utilization and billing revenue and evaluate the success of your SBHC model.

Resources

- SBHC SPO Certification Standards webpage. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/certification.aspx
- SBHC State Program Office Data Requirements. Available at: http://public.health.oregon.gov/HealthyPeopleFamilies/Youth/HealthSchool/SchoolBasedHealthCenters/Pages/data-requirements.aspx
- "SBHC Key Performance Measures" training by SBHC SPO. Available at:
  - Recording: https://www.youtube.com/watch?v=RzAGh_Kbess
  - Slides: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Documents/SBHC%20Certification/KPM_Training_2022.pdf
- Oregon Health Plan (Medicaid) provider enrollment information from the Oregon Health Authority. Available at: https://www.oregon.gov/oha/HSD/OHP/Pages/Provider-Enroll.aspx
- "OCHIN Epic Health Assessment/Episode Training." Available at: https://www.youtube.com/watch?v=8dXe0HiOndg
- Memo from SBHC SPO Regarding Use of UB Modifier in SBHCs. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Documents/SBHC%20Data/SBHC_UB_Modifier.pdf
- "Provider Resource List for Oregon Health Plan" from the Oregon Health Authority: https://sharedsystems.dhsoha.state.or.us/DHSForms/Served/he3046.pdf
- Oregon Primary Care Association. http://www.orpca.org/

Strategy: Engage your local CCO(s)

With a focus on youth-centered care, SBHCs are well-positioned to help Coordinated Care Organizations (CCOs) achieve the benchmarks outlined in the Oregon Health Authority CCO Incentive Measures and State Performance Measures related to children and young adults. You have likely already engaged CCOs serving youth in your school district during your needs assessment and your medical sponsor, LPHA or other partners may already have a relationship with your local CCO(s) as well. It is important to connect with CCOs operating in your area during the implementation stage to discuss your SBHC model and the populations you will serve prior to opening your SBHC.

☐ Develop or utilizing existing messaging to underscore how the SBHC will support the goals of your local CCO(s).

☐ Meet with representatives from local CCO(s) to provide information about the planned SBHC, including populations to be served (particularly OHP clients), services to be provided, opportunities for funding, etc.

☐ Discuss how the medical sponsor can continue to share information with local CCO(s) about SBHC operations once it has opened.

☐ Provide opportunities for the CCO(s) to continue to be involved with the SBHC, including serving on the SBHC Advisory Council.

Resources

- Oregon Coordinated Care Organizations. https://cco.health.oregon.gov
- Oregon CCO Service Areas Map. https://sharedsystems.dhsoha.state.or.us/DHSForms/Served/le8116.pdf
- Oregon Innovator Agents. http://www.oregon.gov/oha/Transformation-Center/Pages/Innovator-Agents.aspx
- Oregon CCO Metrics Information. https://www.oregon.gov/oha/hpa/analytics/pages/cco-metrics.aspx
- Oregon Health Authority Transformation Center. https://www.oregon.gov/oha/hpa/dsi-tc/pages/index.aspx

Strategy: Prepare clinic to meet SBHC SPO Standards for Certification

As you prepare to open the clinic, it is important to ensure you have all the State required elements in place to apply for certification. The SBHC SPO will not be able to approve your application if your SBHC is unable to meet the minimum standards and submit all required documentation. For more information about the SBHC SPO certification requirements and process, visit: www.healthoregon/sbhc and click the "Certification Standards" tab.

☐ Review the SBHC Standards for Certification

☐ Review the Certification Process for New SBHCs checklist

☐ Review the SBHC Certification Verification Review Tool

☐ Ensure your clinic meets all State certification requirements

☐ Formalize all partnerships with written agreements (i.e., MOU, IGA signed from all parties including medical sponsor, county, school district, school, behavioral health agency and dental agency, as applicable)

☐ As applicable, inform LPHA of the planned SBHC certification application and establish their contractual preferences if SBHC is funded through SBHC SPO.

Resources

- SBHC SPO Certification Standards webpage. Available at: https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/certification.aspx
  - o Webpage includes links for:
    - SBHC Standards for Certification
    - SBHC Certification Process for NEW SBHCs
    - SBHC Certification Verification Review tool
- "Oregon School-Based Health Center Funding" information from the Oregon SBHC SPO. Available at:

https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/funding.aspx