FY 2019 LPHA Local Government Investment Data Collection

Instructions and Guidance

Finalized November 2019
Five Key Documents for Data Collection Process:

- These instructions/guidance (sent with invitation email)
- Foundational Capabilities/Programs – Inclusions and Exclusions Document (sent with invitation email)
- Public Health Modernization Manual (link in invitation email)
- Data Worksheet (sent with invitation email)
- Narrative, In-Kind Information and Certification Form (sent with invitation email)
Overview of Instructions/Guidance

- Public Health Modernization Funding Formula
- Goals of FY19 data collection
- Data being collected
- Excluded Data
- Validation Requirement
- Step by Step Process for Reporting Data
- Timeline
Public Health Modernization Funding Formula

• In 2015, ORS changed to allow for matching funds to incentivize county investment in public health in the public health modernization funding formula through matching funds component
• 2017-19 biennium, funding formula was not turned “on”
• 2019-21 biennium -- funding formula was turned “on” but not matching funds component due to allocation amount
Purpose of FY19 LPHA Local Government Investment Data Collection

- Need to track county government investments for when matching funds component is activated for the funding formula
- Focus on Foundational Capabilities and Programs related expenditures paid by county general and/or other funds
- Please submit actual expenditure amounts, NOT budgeted amounts.
Changes to the FY 2019 Tool

- Clearer definitions of County General Funds, County Other Funds and In-Kind Support
- In-Kind Support is reported directly in Step #1 of the Tool
- In-Kind Support detail is provided as part of the Narrative and Certification Form that is uploaded
- Updated guidance and instructions
Before You Start

- Have all the documents you need to do your calculations
- Most of the work will be done offline – use the worksheet provided, if it’s helpful
- Know that once you hit “Submit” you can’t go back and revise
Step #1

- Have your numbers ready before you start - once you click “Submit” you can’t go back.

- Use the link to access the online form

- Attach/upload two validation documentation files

- Remember to save files with your county name at the end

PUBLIC HEALTH DIVISION
Office of the State Public Health Director
Step One – Overview

• Time period: July 1, 2018 – June 30, 2019
• Only report:
  – LPHA expenditures paid with county general funds
  – LPHA expenditures paid with county other funds (fee revenue and insurance reimbursement should be included)
  – In-Kind Support
  – Exclusions amount
  – Attach two validation documents
  – Contact email
• LPHA fiscal staff and administrators should work closely together
Step One – Key Definitions

- **County General Funds** = Funds that come from the county general fund budget.

- **County Other Funds** = Generally, these are funds that the county generates through collection of fees, insurance reimbursement or other means. Grants from outside funders are NOT considered County Other Funds.

- **In-Kind Support** = These are non-cash contributions. These are costs that are covered by the LPHA/County as in-kind and do not appear in the LPHA’s account systems and reports. Contribution amounts should be based on the fair market value of the contributions. (Example: LPHA uses a county-owned or leased building but is not charged rent either directly or through indirect costs)
Step One – Exclusions

- Provision of Ryan White case management services
- Reproductive health client services
- Immunization clinics, including costs associated with providing immunizations at targeted community events unless to provide medical countermeasures during a public health emergency as defined in ORS 433.442.
- Clinical support
- Corrections health, including jail nurse
- Individual dental services
- Primary care services
- Occupational health services
- Medical examiner
- Mental health and addiction services and treatment
- Provision of emergency medical services
- Refugee resettlement screening
- Animal control/animal shelter

** Also see exclusions information listed on Foundational Capabilities/Programs Inclusions and Exclusions document **
Step One – Data Collection

• **Definition of public health emergency in ORS 433.442:**

  “Public health emergency” means an occurrence or imminent threat of an illness or health condition that:

  – Is believed to be caused by any of the following: bioterrorism; the appearance of a novel or previously controlled or eradicated infectious agent or biological toxin that may be highly contagious; an epidemic of communicable disease; a natural disaster, a chemical attack or accidental chemical release or a nuclear attack or nuclear accident; **AND**

  – Poses a high probability of any of the following harms: a large number of deaths in the affected population; a large number of serious or long-term disabilities in the affected population; or widespread exposure to an infectious or toxic agent that poses a significant risk of substantial future harm to a large number of persons in the affected population
Step One – File Attachments

• Supporting documentation is required to be uploaded into the tool

• OHA is required to do basic validation of information reported in Step One since data may be used for matching funds

• **Supporting documentation must include two files:**
  1. An accounting system generated report or a report built from an accounting system data export that corresponds with the reporting boxes for amount of LPHA expenditures paid with county general funds and county other funds.
  2. A completed and signed Narrative, In-Kind Information and Certification Form (form will be sent with the email invitation to report the expenditure data)
Step One – Narrative and Certification Form

- Form was attached to invitation email
- Narrative portion
  - Describe any differences in dollar figures between the system generated report (or report with system generated data export) and the dollar figures reported in Step #1.
  - Most often, the differences would be explained by exclusions, so please note if the case
  - If there are other reasons for the differences that would not be obvious to OHA staff reviewing the validation information, please explain in this area
Step One – Narrative and Certification Form

• In-Kind Support Information
  – Complete table describe the in-kind support with fair market value for each type of support and what fair market value is based on

• Certification
  – Review, signed and dated by LPH Administrator and Fiscal Officer/Administrator/Manager
Step Two – Data Collection

- You will receive an email shortly after your submission of Step #1. Click the blue “Open Update Form” button.
Step Two

• The second form will:
  – allow you to separate your total into Public Health Modernization foundational programs and capabilities
  – Have your LPHA already identified
  – Can only be used once
  – If your totals do not match, you will be asked to resubmit figures

REMEMBER: Have your numbers ready before you start. Once you click “Submit Update” you can’t go back.
Step Two

• Capture how the LPHA expenditures (minus the exclusions) break out into Foundational Programs and Capabilities categories

• Foundational Programs
  – Communicable disease control
  – Prevention & health promotion
  – Environmental health
  – Access to clinical preventive services

• Foundational Capabilities
  – Emergency preparedness & response
  – Cross-cutting strategic development & leadership

• Administrative and Other Indirect Costs

• Wherever possible, please assign actual and indirect costs to foundational programs or capabilities rather than administrative category
### Data Being Collected – LPHA

**Expenditure Inclusions/Exclusions**

<table>
<thead>
<tr>
<th>Included</th>
<th>Precaution &amp; Health Promotion</th>
<th>Environmental Health</th>
<th>Access to Clinical Preventive Services</th>
<th>Emergency Preparedness &amp; Response</th>
<th>Cross-Cutting Strategic Development &amp; Leadership</th>
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**PUBLIC HEALTH DIVISION**

**Office of the State Public Health Director**
Timeline

- January 6, 2020: Invitation to report FY19 LPHA Local Government Investment Data sent to LPHA fiscal contacts and administrators

- January 7 (1:00 p.m.) and January 9 (11:00 a.m.): Two identical online meetings to orient LPHA fiscal contacts and administrators to reporting process

- Close of business, February 14, 2020: All data due to OHA through online reporting tool
Need help?

- For content questions not covered in the documentation, contact Danna Drum at danna.k.drum@state.or.us
- For SmartSheet issues, contact Joey Razzano at joey.w.razzano@state.or.us