



# Operational Profile Training

Thursday, September 11<sup>th</sup>, 2014



# Agenda

- ✓ SBHC Site Coordinator role
- ✓ Why, When & Where
- ✓ Operational Profile structure
- ✓ Staff – Who to include
- ✓ SPO changes to Operational Profile
- ✓ Common Trouble Areas
- ✓ Audit Process
- ✓ Operational Profile User's Guide

# SBHC Site Coordinator role

- Operational Profile
  - Oct 1<sup>st</sup> deadline
  - Update as changes occur throughout the year
- Data Submissions
  - Mid-year, year-end
- Fill required SBHC roles
  - A full list of roles can be found on our website
- Communicate with partners
  - LPHA, SBHC Staff, etc.

# Why have an Operational Profile?

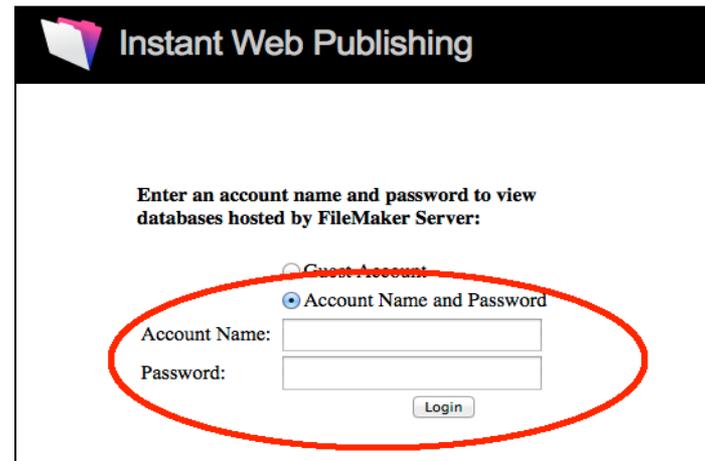
1. It's **required for Certification**
2. It is proof that sites are in compliance for standards we cannot see on a site visit such as:
  - Staffing types, hours of operation, KPM & financial information
3. Enables SPO to answer questions regarding the SBHC systems that come from legislators and/or partners like:
  - PCPCH Status, number of centers with Youth Advisory Committee, number of centers with Dental Providers, etc.

# When to fill out the profile

- Before certification: One month prior to initial verification site visit (A.2.a.2.iii.b)
- After certification: Yearly renewal **no later than October 1** to remain certified (A.2.a.2.iv.c)
- As changes occur throughout the year

# Where to get started

- Access the login page by visiting:  
[http://west-26.fmsdb.com/fmi/iwp/res/iwp\\_auth.html](http://west-26.fmsdb.com/fmi/iwp/res/iwp_auth.html)
  - Link can also be found on SPO website
- Login information is issued by SPO to new sites and existing sites who have a new medical sponsor
- They do not change from year to year
- Feel free to contact us if you lose or forget your login information



Instant Web Publishing

Enter an account name and password to view databases hosted by FileMaker Server:

Guest Account

Account Name and Password

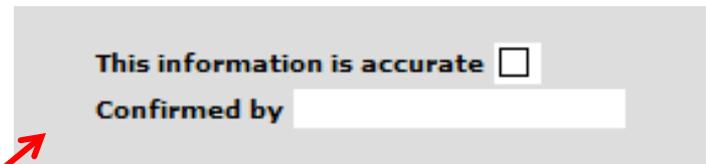
Account Name:

Password:

Login

# Operational Profile structure

- You must review and update the following areas:
  - Details
    - Including County, System and Medical Sponsor information
  - Operations
  - Staff
    - Individual Staff pages (Staff & Shift Hours)
  - Shift Hours
  - KPMs
  - Annual Revenue



This information is accurate   
Confirmed by

- Be sure to mark the accuracy confirmation box. If you don't we can only assume you aren't done.

## Reminder:

- SBHC **details, operations** and **staff** information should be for the current (2014-15) school year.
- **KPM** and **Financial data** should be from the previous school year (July 1, 2013 to June 30, 2014).

# SPO Changes to Operational Profile

- We have made changes to the following 'tabs':
  - Details
  - Staff
    - Individual Staff & Shift Hours
  - Shift Hours
  - Cert Waiver
- No changes have been made to the following 'tabs':
  - Operations
  - KPM
  - Financial

# Changes to Details 'tab'

**SBHC Detail - Web** HOME LIST

**Fake SBHC** SBHC ID 9999

**Details** | Operations | Staff | Shift Hours | Cert Waiver | KPM | Financial

**SBHC Name** Fake SBHC **Host School Name** Yo

**SBHC Physical Address** **SBHC Mailing Address**  Same as Physical

**Address Line 1** 999 Fake St. **Mail Address Line 1** D ST

**Address Line 2** Suite 2756 **Mail Address Line 2**

Fakertons OR 97213 Fakertons OR 97213

**Phone** 503-222-8883 **InfoSystem** Info System **Bill 3rd party**  Yes  No

**Fax** 503-222-8883 **Primary Care EMR** The EMR **Electronic Claim**  Yes  No

**Mental Health EMR**

**County Info** To County

**County** Cascadiaq

**Primary Contact** Terry Smith

**Phone** 555-555-5553

**Email** TS@cascadiaq.co.gov

**System Info** To System

**System** zCascadia Fake

**Primary Contact** Joe Williams

**Phone** 503-123-4563

**Email** joe@testsystem.net

**Medical Sponsor**

**Medical Sponsor** zCascadia Fake

**Primary Contact** Joe Williams

**Phone** 503-123-4563

**Email** joe@testsystem.net

**This information is accurate**

**Confirmed by** \_\_\_\_\_

# Operations 'tab' – no changes

SBHC Detail - Web

HOME LIST

Fake SBHC SBHC ID 9999

Details **Operations** Staff Shift Hours Cert Waiver KPM Financial

### Hours of Operation

	Regular Open	Close	Open During Summer	Summer Open	Close
Monday	1:30 PM	4:30 PM	<input checked="" type="radio"/> Yes <input type="radio"/> No	10:30 AM	2:30 PM
Tuesday	8:30 AM	4:30 PM		8:30 AM	3:30 PM
Wednesday	9:00 AM	2:00 PM		9:30 AM	2:30 PM
Thursday	6:30 AM	1:30 PM		9:30 AM	3:30 PM
Friday	9:30 AM	2:30 PM		8:30 AM	2:30 PM

### Populations Served

Serves students from other schools  Yes  No

Names of schools or districts that your SBHC serves  
Fakeriffic

Serves Non School-aged Population  Yes  No

Population Served

- Pre-K (Children from birth through 5 years of age)
- Post High School individuals
- Faculty and Staff of the school
- Other

Please enter any other non-student populations served by this SBHC  
Teachers and other staff members.

### FQHC

Are you a Federally Qualified Health Center (FQHC)?  Yes  No

### PCPCH

PCPCH Status  Yes  No

Tier 1

Date of Last Recognition 05/06/2012

### Youth Advisory Committee

Do you have a Youth Advisory Committee?

This information is accurate

Confirmed by

# Staff – Who to include

- Please include all staff that work on-site at the SBHC including:
  - Staff whose hours are not used to meet certification requirements
  - Staff whose data is not submitted to the SPO
    - I.e.: dentist, hygienist, health educator, etc.
- Also include staff who do not have clinical shifts but have other roles associated with the SBHC
  - I.e.: Health Department Administrator, SBHC Administrator, etc.
  - Use the 'Comments' box on their individual Shift Hour page to explain why they do not have any hours listed
    - I.e.: No clinical hours - works off-site

# Changes to Main Staff 'tab'

SBHC Detail - Web

HOME LIST

Fake SBHC SBHC ID 9999

Details Operations **Staff** Shift Hours Cert Waiver KPM Financial

To add an existing staff member to this SBHC   
To see all existing staff or create a new member

Staff Name	Roles	
<input type="button" value="To Staff"/> Crystal Test	Medical Director; Primary Care (MD, DO, ND, NP, PA); Privacy Official/Officer; Immunization Coordinator	<input type="button" value="x"/>
<input type="button" value="To Staff"/> Gary Test	SBHC Administrator; SBHC Site Coordinator;	<input type="button" value="x"/>
<input type="button" value="To Staff"/> Test First Test Last	Primary Care (MD, DO, ND, NP, PA)	<input type="button" value="x"/>

**Missing Health Dept Admin**  
**Missing Health Dept SBHC Primary Contact**  
**Missing Primary Care (MD, DO, NP, PA)**  
**Missing Clinical Lab Director**  
**Missing Quality Assurance Coordinator**

Created: 3/16/2012 10:14:49 AM  
Last Viewed: 8/20/2014 3:56:24 PM  
View Count: 1929

This information is accurate  
Confirmed by

# Changes to Individual Staff 'tab'

**Staff Detail - Web**

HOME LIST

Gary Test Staff ID 357

**Staff** Shift Hours

First Gary Last Test

Phone Number of staff member Alt. Phone Number

Email of staff member

(If mailing address other than SBHC)

Program/Organization Name

Address Line 1

Address Line 2

City State Zip

**Roles**

- Clinical Lab Director
- Dental Provider (DMD, EFDA, RDH)
- Health Dept Administrator
- Health Dept Nursing Supervisor
- Health Dept SBHC Primary Contact
- Immunization Coordinator
- Laboratory Coordinator
- Medical (RN/LPN)
- Medical Director
- Primary Care (MD, DO, ND, NP, PA)
- Privacy Official/Officer
- Qualified Mental Health Provider (QMHP)
- Quality Assurance Coordinator
- SBHC Administrator
- SBHC Site Coordinator
- Support Staff (Office/Health/Medical)

**Licensing Credentials**

- MD
- DO
- ND
- PA
- NP
- RN
- LPN
- CNA
- Medical Assistant
- QMHP
- LCSW
- Alcohol & Drug Counselor
- Dentist (DMD)
- Registered Dental Hygienist (RDH)
- Expanded Function Dental Assistant (EFDA)
- Health Educator

**Other Roles**

Janitor

**Other Credentials**

LMT

SBHCs associated with Gary Test

To SBHC	Fake SBHC

Systems associated with Gary Test

To SBHC	Fake SBHC

Staff members can be associated with a system, even if they aren't staff members at any SBHC in that system

Confirmation has moved to 'Main Staff tab'

Created 6/8/12 9:01 AM by web test  
Modified 8/19/13 12:44 PM by Matt Pitney

# Changes to Main Shift Hours 'tab'

SBHC Detail - Web

HOME LIST

Fake SBHC SBHC ID 9999

Details Operations Staff **Shift Hours** Cert Waiver KPM Financial

Day	Start	End	Duration	Staff Member	Role	+ Shift
Monday	11:00 AM	4:00 PM	5	361		x
Monday	8:00 AM	3:00 PM	7	Test First Test Last	Primary Care (MD, DO, ND, NP, PA)	x
Monday	8:00 AM	10:30 AM	2.5	361		x
Tuesday	3:00 PM	5:00 PM	2	Crystal Test	Medical Director; Primary Care (MD, DO, ND, NP, PA); Privacy Official/Officer; Immunization Coordinator	x
Tuesday	3:00 PM	4:00 PM	1	361		x
Tuesday	10:00 AM	3:00 PM	5	361		x
Wednesday	1:00 PM	6:00 PM	5	Crystal Test	Medical Director; Primary Care (MD, DO, ND, NP, PA); Privacy Official/Officer; Immunization Coordinator	x
Wednesday	6:00 AM	10:00 AM	4	Gary Test	SBHC Administrator; SBHC Site Coordinator;	x
Wednesday	9:00 AM	3:00 PM	6	361		x
Wednesday	9:00 AM	2:00 PM	5	Test First Test Last	Primary Care (MD, DO, ND, NP, PA)	x
Thursday	9:00 AM	2:00 PM	5	Test First Test Last	Primary Care (MD, DO, ND, NP, PA)	x

This information is accurate   
Confirmed by \_\_\_\_\_

# Changes to Individual Shift Hours 'tab'

**Staff Detail - Web**

HOME LIST

Crystal Test Staff ID 274

Staff **Shift Hours**

Day	Start	End	Duration	SBHC Name	Shift
Tuesday	3:00 PM	5:00 PM	2	Fake SBHC	x
Wednesday	1:00 PM	6:00 PM	5	Fake SBHC	x
Friday	10:00 AM	4:00 PM	6	Fake SBHC	x

Write a note here explaining staff members without clinic hours listed – i.e.: Site Administrator, Health Department SBHC Primary Contact

Comments

Confirmation has moved to 'Main Staff tab'

# Changes to Cert Waiver 'tab'

SBHC Detail - Web

HOME LIST

Fake SBHC SBHC ID 9999

Details Operations Staff Shift Hours **Cert Waiver** KPM Financial

	Date Created	Section Letter	Expected Completion	Approved	Date Approved	Date Resolved	
Select	11/29/2012	Laboratory/Diagn	7/11/2014	Yes	4/9/2014	4/9/2014	x
Select	12/5/2012	Data	7/16/2014	Yes	4/9/2014	4/9/2014	x
Select	7/8/2013	Sponsoring	8/20/2013	Yes	8/5/2013	8/5/2013	x
Select	11/4/2013	Sponsoring	12/25/2013	Yes	4/9/2014	4/9/2014	x

+ Waiver

**Certification Waiver Info** null Waiver\_Record

Date Created 8/20/2014 4:31:10 PM

**Submitter Contact**

First  
Last  
Title  
Email  
Phone

**County Contact**

Has County Public Health been notified?  Yes  No

First  
Last  
Title  
Email  
Phone

Certification Section

Which standard is not being met?

Explanation of why standard is not met

Action plan to meet standard

Expected date of compliance

View Report Submit

- Sponsoring Agency/Facility
- Operations/Staffing
- Laboratory/diagnostic services
- Comprehensive services
- Data collection/reporting
- Billing

# KPM 'tab' – no changes

SBHC Detail - Web

HOME LIST

Fake SBHC SBHC ID 9999

Details Operations Staff Shift Hours Cert Waiver **KPM** Financial

**+ KPM**

Date Created	Fiscal Year	RA %	CPE %	BMI %	
Select 8/5/2013	7/1/2011 to 6/30/2012	32.0%	88.9%	100.0%	X
Select 9/26/2013	7/1/2012 to 6/30/2013	66.7%	93.3%	92.9%	X
Select 9/3/2014					X

**Key Performance Measure Info**

Date Created 9/3/2014 4:20:49 PM

Fiscal Year

**Risk Assessments (RA)**

Reviewed  Number of charts reviewed

In compliance  Number of charts in compliance

Percent of charts in compliance

**Comprehensive Physical Exam (CPE)**

Reviewed  Number of charts reviewed

In compliance  Number of charts in compliance

Percentage of charts in compliance

**Body Mass Index (BMI)**

Reviewed  Number of charts reviewed

In compliance  Number of charts in compliance

Percentage of charts in compliance

Please provide any explanations/feedback

# Financial 'tab' – no changes

SBHC Detail - Web

HOME LIST

Fake SBHC SBHC ID 9999

Details Operations Staff Shift Hours Cert Waiver KPM **Financial**

	Date Created	Fiscal Year	Total Op Rev	Annual Rev
Select	7/17/2012	7/1/2011 to 6/30/2012	\$5,100.00	X
Select	8/16/2012	7/1/2011 to 6/30/2012	\$306.00	X
Select	9/4/2012	7/1/2011 to 6/30/2012	\$15,000.00	X
Select	8/5/2013	7/1/2011 to 6/30/2012	\$2,027.25	X
Select	8/4/2014	7/1/2013 to 6/30/2014		X

**Annual Revenue Info**

Date Created 8/4/2014 3:06:16 PM

Fiscal Year 7/1/2013 to 6/30/2014

**Revenue Breakdown by Source**

- One time grants or awards (public or private)
- Public funds (federal, state, county, city)
- Fundraising and in-kind donations
- Patient fees
- Third party billing
- Other
- Total Operating Revenue

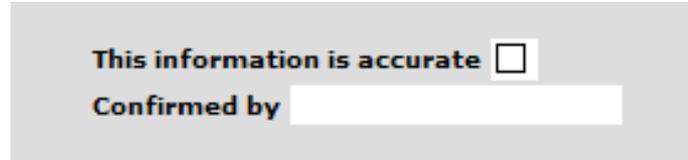
Please provide any explanations/feedback

Edit Entry

QUESTIONS???

# Common Trouble Areas

- Checking the accuracy confirmation box
  - Located on Details, Operations, Staff & Shift Hours 'tabs'

A screenshot of a confirmation box with a grey background. It contains the text "This information is accurate" followed by an unchecked checkbox. Below this is the text "Confirmed by" followed by a white rectangular input field.

- Incomplete and inaccurate staff information (i.e.: email, shift hours, off site addresses, etc.)
  - Update staff information from their individual staff records
  - Click on the 'To Staff' button to reach individual staff records
- KPMs – All percentages should be under or at 100%
  - If it's over 100% the information is incorrect

QUESTIONS???

# SPO Operational Profile Audit Process

- Existing SBHCs:

- The profile audit begins after the October 1<sup>st</sup> deadline
  - What we are looking for:
    - All the required areas are complete and confirmed
      - » Details, Operations, Staff, Shift Hours, KPM & Financial information
    - SBHC has met minimum operating hours
    - SBHC has met minimum staffing requirements
  - Sites will be notified by November 1<sup>st</sup> of their renewal status

- New SBHCs:

- Operational Profiles are due one month before the initial verification site visit
- Operational Profiles will be reviewed at that time and sites will be contacted before the verification site visit

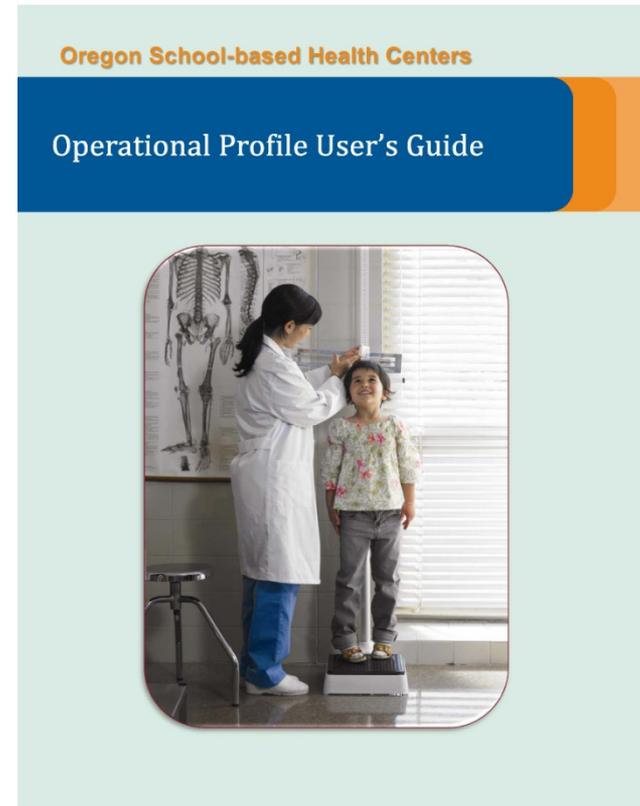
**Don't forget...**

**WE ARE HERE TO HELP!**

The audit process is not meant to be an iron hammer. If things look amiss we will help you. Just like the verification site visits, we are your partners and want you to succeed!

# Operational Profile User's Guide

- Step-by-step instructions for making changes in the Operational Profile
- Can be found on our website at:  
[www.healthoregon.org/sbhc](http://www.healthoregon.org/sbhc)



# Contact Information

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[www.healthoregon.org/sbhc](http://www.healthoregon.org/sbhc)

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