This checklist is a resource for communities planning for a new School-Based Health Center (SBHC). It is meant to serve 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 implementation stage is a one- or multi-year exploratory period in which partners come together to get a certified SBHC up and running at a school site. Planning communities typically spend this stage constructing or remodeling the SBHC site, developing SBHC policies and procedures, hiring staff, purchasing medical equipment and supplies, marketing the SBHC to the community, opening the SBHC, and applying for State SBHC certification. This stage can be different for each community, depending on local capacity, medical sponsor involvement, and available resources.

The implementation stage is typically preceded by the community readiness stage of planning. Resources for this stage can be found in the accompanying "Community Readiness Strategies Checklist."

The Implementation Strategies Checklist and associated resources are drawn from over a decade of SBHC planning grant experience by the SBHC State Program Office (SPO) and local communities. Each section highlights strategies planning communities have used to successfully open a new SBHC. Activities in support of these strategies can be checked as they are completed. The strategies and activities 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. The listed resources, including those from the SPO SBHC Planning Manual are available by request from the SPO.

SPO strongly encourages planning communities to engage local stakeholders during the planning process. Currently, only Local Public Health Authorities (LPHAs) are eligible for state SBHC funding for certified SBHCs. Therefore LPHAs should be involved early in the planning process.

Local Public Health Contacts:
Directory for Local Public Health Authorities
http://public.health.oregon.gov/ProviderPartnerResources/LocalHealthDepartmentResources/Pages/lhd.aspx

SBHC State Program Office Contacts:
sbhc.program@state.or.us
971.673.0871

Strategy: Determine clinical services and referral sources

The clinical services offered in your SBHC will be determined by a number of factors; 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 onsite in order to enhance the SBHC's sustainability.

Checklist

As you work to get your SBHC up and running, you should consider the following:

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

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

- ☐ Work with other local medical providers, if necessary, and the school nurse to build an integrated, collaborative system of care for SBHC clients. Ensure all partners are committed to a common vision for the SBHC and client care.

- ☐ 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.

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

Available Resources

- Oregon SBHC Standards for Certification. Available at: http://public.health.oregon.gov/HealthyPeopleFamilies/Youth/HealthSchool/SchoolBasedHealthCenters/Documents/CertificationStandards2014.pdf
- Oregon Primary Care Association. http://www.orpca.org/
- Oregon Division of Medical Assistance Programs. http://www.oregon.gov/oha/healthplan/pages/psu.aspx
- 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." Available at: https://www.youtube.com/watch?v=d8MHHcMudXQ
- "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/

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, and clinic space, 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.

Checklist

As you work to get your SBHC up and running, you should consider the following:

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

- ☐ If medical sponsor is unable to provide certain types of services (e.g., mental health or dental), 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 grant funding and public and private insurance reimbursement.

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

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

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

Available Resources

- Oregon SBHC Standards for Certification. Available at: http://public.health.oregon.gov/HealthyPeopleFamilies/Youth/HealthSchool/SchoolBasedHealthCenters/Documents/CertificationStandards2014.pdf
- Oregon Office of Rural Health. http://www.ohsu.edu/xd/outreach/oregon-rural-health/providers/index.cfm
- HRSA Loan Repayment. http://www.hrsa.gov/loanscholarships/repayment/nursing/

Strategy: Develop policies that promote clinical quality

The SBHC State Program Office requires certain policies and procedures for all certified SBHCs. The SPO will provide each certified SBHC with a Certification Binder so that paper copies of required policies and procedures will be centrally located during the certification site visit and available for SBHC staff to reference. Policies are written by the medical sponsor, but should be SBHC-specific and be drafted with participation from the Planning Committee and/or partners.

Checklist

As you work to get your SBHC up and running, you should consider the following:

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

☐ Obtain feedback from the Planning Committee and other stakeholders 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). Ask school or medical legal counsel to review policies, if necessary.

☐ Develop policies, procedures and necessary forms to support clinical referrals and information sharing among partner agencies.

☐ Send draft policies and procedures to the SPO Certification Team for feedback.

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

☐ (Once certified) place all SPO-required policies in Certification Binder, which will be provided by SPO.

Available Resources

- Example policies and procedures. Available by request from the SPO.
- "Minor Rights: Access and Consent to Health Care" from the Oregon Health Authority. Available at: https://public.health.oregon.gov/HealthyPeopleFamilies/Youth/Documents/MinorConsent2012.pdf
- "HIPAA/FERPA 101" from Building Healthy Futures and Baird Holm, LLP. Available at: https://www.youtube.com/watch?v=OvMZQZ-Rzec

Strategy: Maximize resources for the SBHC build out

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. It is best to contact the 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.

<u>Checklist</u>

As you work to get your SBHC up and running, you should consider the following:

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

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

☐ Ensure clinic facility design promotes the comfort and confidentiality of youth clients (see "Ensure clinic 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.

<u>Available Resources</u>

- Sample SBHC floor plans. Available by request from the SPO.
- 2010 ADA Standards for Accessible Design. Available at: http://www.ada.gov/2010ADAstandards_index.htm

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 children and youth clients.

Checklist
As you work to get your SBHC up and running, you should consider the following:

☐ Talk with youth at the school 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 children and adolescents.

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

☐ Ensure clinic policies encourage parental involvement, wherever appropriate.

☐ Ensure clinic is decorated with feedback from the youth who will use it. 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.

Available Resources

- "Characteristics of Youth-Friendly Clinical Services" from the Healthy Teen Network. Available at: http://www.healthyteennetwork.org/sites/default/files/TipSheet_CharacteristicsYouth-FriendlyClinicalServices_0.pdf
- "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 Clinical Services" from Advocates for Youth. Available at: http://www.advocatesforyouth.org/publications/publications-a-z/1347--best-practices-for-youth-friendly-clinical-services

- "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
- University of Michigan Adolescent Health Initiative. http://umhs-adolescenthealth.org/
- Society for Adolescent Health and Medicine THRIVE app for parents of teens and young adults. Available at: https://itunes.apple.com/us/app/sahm-thrive/id1031367507?ls=1&mt=8

Strategy: Ensure clinic has appropriate supplies
The SBHC medical sponsor 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. Once you have the supplies necessary for SBHC operations, you will also need to apply for enrollment from the Oregon Vaccines for Children (VFC) program and to obtain the appropriate laboratory certification from the Oregon State Public Health Laboratory Compliance Section.

Checklist
As you work to get your SBHC up and running, you should consider the following:

☐ Purchase appropriate equipment to provide immunizations for SBHC clients, as required by the Oregon Vaccines for Children (VFC) program.

☐ 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.

Available Resources

- "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 VFC Enrollment Information. Available at: http://public.health.oregon.gov/PreventionWellness/VaccinesImmunization/ImmunizationProviderResources/vfc/Pages/enroll.aspx

Strategy: Ensure appropriate data and billing capabilities are in place
The SBHC SPO Standards for Certification require all certified SBHCs to maintain an electronic data system that is compatible with the SPO data collection system and has the capacity to collect the required variables listed in the Standards. In addition, all certified SBHCs are required to, at a minimum, bill Medicaid. New sites are also required to submit a sample of 2-4 weeks of encounter data to the SPO as part of their application for certification. 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.

Checklist

As you work to get your SBHC up and running, you should consider the following:

☐ Review data collection/reporting and billing requirements in the SBHC SPO Standards for Certification.

☐ Notify the Oregon Health Authority, Health Systems Division (formerly known as the Division of Medicaid Assistance Programs (DMAP)) that you will be providing services to Medicaid clients at the new SBHC site and/or (if necessary) enroll SBHC providers in Oregon Medicaid.

☐ Obtain information and training on billing Medicaid claims.

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

☐ If the medical sponsor is a FQHC, file a scope of project change with the Health Resources and Services Administration (HRSA).

Available Resources

- SBHC State Program Office Data Requirements. Available at: http://public.health.oregon.gov/HealthyPeopleFamilies/Youth/HealthSchool/SchoolBasedHealthCenters/Pages/data-requirements.aspx
- "Provider Enrollment Handbook" from the Oregon Health Authority. Available at: http://www.oregon.gov/oha/healthplan/tools/Provider%20Enrollment%20Handbook.pdf

- "Billing and Coding Training" by SCHA-MI Consulting Services. Available at: https://www.youtube.com/watch?v=pUnqkIr7W-w
- "OCHIN Epic Health Assessment/Episode Training." Available at: https://www.youtube.com/watch?v=OO4TBxnUiJs&feature=youtu.be
- Oregon Health Authority, Health Systems Division (formerly known as DMAP & AMH) Provider Enrollment, Medicaid Billing, FQHC medical sponsors – current contact information: Linda.fanning@state.or.us or 503-945-6490

Strategy: Develop a marketing plan

Marketing your SBHC is essential for its long-term sustainability. The school and broader community should be kept informed about SBHC planning during the community readiness stage. However, the implementation stage is the time for the Planning Committee and other stakeholders 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.

<u>Checklist</u>

As you work to get your SBHC up and running, you should consider the following:

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

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

☐ Develop a marketing plan utilizing information gathered during your needs assessment and through conversations with youth and other stakeholders (see below for marketing resources).

☐ 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, local public health, etc.

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

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

☐ Ensure SBHC has 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.

☐ Schedule SBHC open house and tours as part of back-to-school night, student orientation, parent night, health fair, etc.

<u>Available Resources</u>

- "Developing a Marketing Plan for Your School-Based Health Center" from the Colorado Association for School-Based Health Care. Available at: http://www.casbhc.org/Publications/2013%20Conference/CASBHC%20Presentation_May%202_2013%20FINAL.pdf
- Marketing Plan Development Tool from the Colorado Association for School-Based Health Care. Available at: http://www.casbhc.org/Publications/2013%20Conference/Costin_marketing%20plan%20development%20tool%20formattedFINAL.pdf
- Sample SBHC marketing tools, available by request from SPO.
- 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

Strategy: Engage your local CCO

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. Your medical sponsor, LPHA or other local partners may already have a relationship with your local CCO. It is important to reach out to the CCO to develop a relationship in advance of the opening of your SBHC to discuss your SBHC model and the populations you will serve.

Checklist

As you work to get your SBHC up and running, you should consider the following:

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

- ☐ Meet with local CCO representatives to provide information about the SBHC, including populations to be served (particularly OHP clients), services to be provided, etc.

- ☐ Discuss how the medical sponsor can continue to share information about SBHC operations once it has opened.

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

Available Resources

- SBHC State Program Office Health System Transformation information page: http://public.health.oregon.gov/HealthyPeopleFamilies/Youth/HealthSchool/SchoolBasedHealthCenters/Pages/Transformation.aspx
- Oregon Coordinated Care Organizations. https://cco.health.oregon.gov
- Oregon Innovator Agents. http://www.oregon.gov/oha/Transformation-Center/Pages/Innovator-Agents.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 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 SPO certification requirements and process, visit: www.healthoregon/sbhc and click the "Certification Standards" tab.

Checklist

As you work to get your SBHC up and running, you should consider the following:

☐ Review the SBHC Standards for Certification and Verification Review Tool to ensure your clinic meets all State certification requirements.

☐ Ensure the SBHC is able to meet all the certification data requirements of the SBHC State Program Office.

☐ Ensure EHR system(s) have capability to submit required data variables to SPO.

Available Resources

- SBHC State Program Office Standards for Certification. Available at: http://public.health.oregon.gov/HealthyPeopleFamilies/Youth/HealthSchool/SchoolBasedHealthCenters/Documents/CertificationStandards2014.pdf
- SPO Certification Verification Review tool. Available at: http://public.health.oregon.gov/HealthyPeopleFamilies/Youth/HealthSchool/SchoolBasedHealthCenters/Documents/SBHC%20Certification/SBHCCertReviewTool.pdf