

INSTRUCTIONS: SBHC PRODUCTIVITY TEMPLATE V1.0

This productivity template is intended for SBHCs to internally evaluate their productivity and to document their practice for stakeholders. WE recommend that you make a copy of the Productivity Template file before starting and work from the copy. There are some assumptions inherent in this template. The assumptions include:

- 1.) Evaluating SBHC productivity is about more than number of encounters especially if data collected is limited to billable encounters.
- 2.) The evaluation of productivity is tied to outcomes. Improved outcomes can be more desirable than more encounters.
- 3.) SBHC practice is different from other practice environments. Resources (staff, \$, equipment) may be less. Outcomes and accountability are different and may be related to non-billable activities.
- 4.) Everyone can do better.
- 5.) The evaluation of productivity in SBHCs requires a balanced score card which includes measures, intensity of work, encounters and non-billable work that SBHCs do.

Section	Name	Instructions	Comments
A	Name of SBHC	Enter <b>name of SBHC</b> in the cell provided.	There are 3 blank New SBHC report cards. You can copy the tab(s) and make more if you need to. You can re name the tab as well.
B.	# of student days in reporting period	Enter <b>number of official days</b> that students were in the school for the reporting period in the cell provided. Enter this number even if you were open and available to see students on other days.	Don't include snow days teacher in-service days, do include assembly , testing days, but not faculty days
C.	Hours of operation	Enter your <b>hours of operation</b> in the cell provided.	Time clinic opened and closed include is clinic closes for lunch e.g. 8-4. 7-3, 8-12 and 12:30-4:30
D.	SBHC description (rural, urban, suburban), years of operation, grades served)	Identify the location of your SBHC, how many years it has been in operation, and the grades served by the school in the cell provided.	You may want to include other special characteristics not on this template regarding the setting of your SBHC.
E.	Enrollment and Clinic Users	<ol style="list-style-type: none"> <li>1. Enter the official <b>school enrollment (in the school you are located)</b> in the cell provided. The recommendation is that you use an official school number from the end of each quarter</li> <li>2. Enter the <b>SBHC enrollment</b> in the cell provided. Enrollment is defined as students who are registered or have consent to use the clinic but may or may not have used it in a prescribed period of time. The formula for the % is already entered and will give you the % of school enrollees also enrolled in the clinic.</li> </ol>	<p>Use either quarterly or annual figure for your own purpose for management.</p> <p>In some centers the number of enrolled and number of registered students will be the same and in other centers they will be different.</p>

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E. (cont'd)	Enrollment and Clinic Users	<p>3. The recommendation is that you use the number of enrollees at the end of each quarter. Identify what % this is of school enrollment and your target enrollment as a percentage of school enrollment for the year and enter those numbers in the cells provided.</p> <p>4. Enter the total number of <b>SBHC users</b> for the quarter in the cell provided. This number should be unduplicated. Then break down the <b>users by type of service</b> used (medical, behavioral, oral health) and enter the numbers in the cells provided. The provider of service not diagnosis defines the service. These may be duplicated counts. I.e. a student may use one or multiple services. If using multiple services they will be counted more than once. The recommendation is that you identify the number of users at the end of each quarter.</p> <p>a. Users are defined as students who have used any SBHC service documented by a provider in their medical, mental health or dental record during that quarter. If you do not provide a service identified on the template such as oral health then fill the cell with a color that denotes not to complete that section or remove the service. Likewise if you provide a service you want to keep track off you can add a service.</p> <p>5. The formula for the percent is already entered and will generate the % of SBHC enrollers who are users, the percent of users who use medical services, percent of users who use behavioral health and percent of users who use dental services.</p>	<p>There has been debate about who to count in the calculation of SBHC enrollment/users when the center serves community clients. We are aware you can end up with #s greater than 100%, which may be misleading. We recommend that you leave as is for now and we will re evaluate it again with beta testing.</p> <p>e.g. If you have no dental staff then you will have no dental services. If you list staff in the staff description area then encounters made by those staff should be included. If you do not list them as staff in your SBHC but identify them as another resource in the school providing services to the students then don't include their user or encounter numbers.</p> <p>Total number of users by service (duplicated) may exceed the total number of users (unduplicated).</p> <p>Establishing targets for enrollment and users should be reasonable and based on improving the actual experience in your SBHC.</p>
F.	Other resources in School	<p>Identify <b>other resources</b> for students in the school that you collaborate with or that may be influencing your ability to provide the students with services.</p> <p>Identify if there is a <b>school nurse</b> in the school and how many hours she/he is present. If you do not have a school nurse in your school state no.</p>	<p>Examples might be other mental health staff in the school, special programs for the students in the school or paraprofessionals with health responsibilities in the school.</p>

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G.	Staff description: title, FTE, clinical hours	<p><b>Staff Description:</b> For each member of the health center team, estimate how many hours each week the member is scheduled/budgeted on site. Do not include interns, volunteers, peer educators, etc. If an individual serves several functions, select the position/title that most aptly describes their primary work in the health center. If more than one staff person fulfills a function, identify each separately. For example, if two nurse practitioners each work for five hours per week <b>each</b> would be listed.</p> <p><b>Clinical Hours:</b> clinical personnel time should be counted as clinical except when they are performing administrative duties <u>not directly connected</u> with provision of clinical services or providing enabling services (ie case management, group health education, eligibility assistance, outreach, home visiting etc). Time spent by clinicians for charting, reviewing labs, writing prescriptions, returning phone calls, arranging for referrals, reviewing charts etc is not considered administrative and should be reported as clinical hours. Clinical supervision (on or off site) is considered clinical time. If there is a Medical Director who spends time in the SBHC engaged in corporate administrative activities such as employee conferencing or staff meetings these activities should not be allocated to clinical.</p>	<p>You may need to account for extended absences when using this as a management tool.</p> <p>These instructions are consistent with the guidelines for the Bureau of Primary Care's Uniform Data System (UDS) which can be accessed at: <a href="ftp://ftp.hrsa.gov/bphc/pdf/uds/udsmanual2004.pdf">ftp://ftp.hrsa.gov/bphc/pdf/uds/udsmanual2004.pdf</a></p>
H.	School Demographics and Users Insurance Status	<p><b>School Demographics and User Insurance Status :</b> Go to the school and user demo tab at the bottom of the Productivity Template Excel file. You will change views. Enter your data here in order to generate the graphics. You might want to save your data before you do this to be certain that you will not loose what you have done so far. Enter the data for school enrollees and insurance in the cells provided for new SBHC. The data that is already in the cells is provided to create the graphics for Example SBHC.</p>	

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I.	School and SBHC Characteristics	<p><b>Title 1 School:</b> On the cell below identify if your school is a Title 1 school ( yes or no) and likewise the % of students receiving free and reduced lunch, % English language learners, % new immigrants.</p> <p><b>SBHC characteristics:</b> Identify if the SBHC provides access to care for others in the community (yes or no). Identify the number of examination rooms and counseling rooms available to see patients. Include dental operatories and # of chairs. If exam rooms are used as counseling rooms on different days count only once. Fill in any other important characteristics regarding your practice. Use your own judgment on what these might be. Fill in the cells provided.</p>	<p>There are several ways to get this information if you do not already know it. The school may be able to give it to you, you can go to the web site for your school district and look it up or you can go to: <a href="http://www.nces.ed.gov/globallocator">http://www.nces.ed.gov/globallocator</a> and search for it at the web site of the National Center for Education Statistics. You may need to use data from the previous school year.</p>
J.	Top five Diagnoses	<p>Identify the top five ICD codes (or DSM or V-code or whatever data system you have coding for) and corresponding diagnoses generated by the SBHC clinical staff during the quarter. Use all diagnoses generated (primary, secondary, tertiary). Identify how many diagnoses for the top five and fill in the cells provided. With ICD-9 numbers go to three digits only so that you get like diagnoses. The cells are formatted not to accept decimal points.</p>	<p>You may want to individualize your report by combining data into categories (such as lumping all STI diagnosis).</p>
K.	Encounter Information	<p><b>Encounter Information:</b> Enter the number of encounters for the quarter by category in the cells provided. Enter your target number of encounters and the difference. Calculate the % of your target that you actually achieved as your difference. It can be positive or negative. Add the data from each quarter in the year to date cells.</p> <ol style="list-style-type: none"> <li>1. Encounters are defined to include a documented, face-to-face contact between a user and a provider who exercises independent clinical judgment in the provision of services to the individual. To be included as an encounter, services rendered must be documented. A provider is the individual who assumes primary responsibility for assessing the patient and documenting services in the patient's record (UDS, 2004).</li> <li>2. Other visits include all other recorded visits to the SBHC that do not meet the criteria for an encounter.</li> </ol>	

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K. (cont'd)	Encounter Information	<b>RVUs:</b> For those who have access to the work RVU component from their MIS systems you can total the RVUs for the CPT Codes generated at each visit for the quarter and add them in this section. If you do not have access to RVUs from your MIS system you may create a list of the RVUs for the CPT codes generated in your SBHC and total them manually. The table at the end of these instructions illustrates this below illustrates this. The formula to calculate differences in absolute numbers is already included in the cells.	You may have a way to categorize these visits which may be helpful for you to do.  You should not have an exhaustive list of CPT Codes needing RVUs in an SBHC practice. One place you can get the list is at <a href="http://www.aap.org/visit/2005rbrvs.pdf">http://www.aap.org/visit/2005rbrvs.pdf</a> . It is revised annually. You will be using the work component only for these purposes (use total sum of all work RVUs).
L	Outreach activities and QI Markers (graphs)	<b>Outreach activities and QI Markers (graphs):</b> To create the graphs at the bottom of the template go to the folder labeled Raw Data at the bottom of the Excel file. Enter the number of <b>school wide events</b> you have conducted this quarter in the actual cell and then number you have targeted for the year in the target cell. Do the same for <b>group health education, classroom presentations, health advisory meetings and school and community meetings.</b> The graphs will appear in the folder for the new SBHC. You do not need to re enter the target every quarter if you keep the same target however if you change your target enter the new target in the cell for that quarter. You can change the scale for each graph if the one provided does not work for you.	The recommendation is to conduct and report at least <b>3 QI activities</b> each quarter. The shells of the three graphs are set up as %. You may need to change these to suit the QI marker you are following. For example in the Example SBHC, number of Physical Exams is a QI marker and the scale is 0-300 since the target is 250. You need to decide if you are setting a single target for the year or revising your target each quarter. If you are doing the former only enter the number in the first quarter

e.g. Calculating total work RVUs for CPT codes

CPT Code(s) May have multiple codes for a single encounter	Frequency	Work RVU	Total Work RVU
99212 Problem focused history and exam, straight forward	68	0.45	30.6
99204 Comprehensive history and exam, moderate complexity	124	2.0	248
Total			278.6