# Data Submission Requirements for SAMH

**Purpose:** The intent of the following policy is to ensure that participants have their services recorded accurately and in a timely manner ensuring best clinical practice, adherence to contractual obligations and appropriate invoicing of services rendered.

**Policy: Participant/Service data** should be recorded on the appropriate Prevention Tracking Form on the same day that the service was rendered or no later than two working days.

 **Participant Registration/Attendance/Discharge** should be recorded on the same day the participant’s status changes or no later than three working days.

 These forms should be submitted to the Data Systems department by close of business on Mondays for the prior week’s activities. All forms for data entry should be entered into the Collaborate Plan and Grow (CPG) system within seven working days of receipt. Recording and submission of data at a pace exceeding this minimum requirement is encouraged.

 This procedure will be made available to all employees it affects. Affected positions includes

* Data Systems, Clerks, Analysts, Supervisor, and Manager
* SAMH Prevention Director and Supervisors who will be responsible for ensuring compliance among their staff
* Any other personnel who supervise and/or enter SAMH data into CPG

**Procedure and/or Process:**

Prevention Specialists use the Prevention Tracking Form for non-classroom Prevention activities and three kinds of rosters (registration, attendance, and discharge) for the Prevention classes that are taught in the schools.

* At the beginning of the EBP delivery cycle, the Prevention Specialist collects student demographic data (gender, race, ethnicity, and DOB) as well as EBP pre-test scores on the registration roster form. Data aggregates the student demographic data on the form and enters it into the CPG PBPS system when creating the EBP cohort. Pre-test scores are recorded on a separate internal spreadsheet. At the end of the EBP cycle, the Prevention Specialist records post-test scores on the discharge roster form. Data adds the Post-test scores to the internal spreadsheet report to be analyzed with pre-test score data at the end of the semester or school year.
* Throughout the month, Data Systems Staff enters the classroom services and prevention activities recorded on the attendance rosters and prevention tracking forms into the CPG PBPS system.
* At the end and start of each month, data is imported from the CPG PBPS system and loaded onto an internal spreadsheet report. Data uses that information to determine data entry and/or staff document submission gaps, as well as verify the quality of the data in the CPG PBPS system

# Data Discrepancies

* The data analyst will try to find and correct issues such as service code errors, staff name errors, location errors, and unusual class times, prior to submission of the data through CPG PBPS for invoicing to LSF. Findings occasionally lead to discussions with the Prevention Specialist regarding specific issues or require the Specialist to provide updated paperwork.
* If feedback cannot be communicated (or errors corrected) within the period required, Data Systems should be contacted prior to the anticipated deadline and made aware of the reason for the delay and when the task will be completed in order to relay this information to the Managing Entity.
* Data downloaded from CPG PBPS is analyzed regularly to ensure that all documented Prevention activities have been entered into that system.
* Once the Prevention data from the CPG PBPS system has gone through review, it is submitted to Lutheran Services of Florida (LSF) (through the aforementioned system). Subsequently, the Data Systems Manager (DSM) will email the LSF contract manager the following attestation: “The data submitted through PBPS is accurate for our agency. I hereby certify on behalf of the agency presenting the aforementioned data for reimbursement that at the time of the submission, no other funding source was known for the included services, to the best of my knowledge.” This wording is required by LSF.
* An invoice (draft) is generated by LSF based on the total number of units produced in the ASA and CSA cost centers for Prevention. The Data Systems Department compares the information on the invoice draft to the information on its internal spreadsheet reports. If these totals are within the expected range, the DSM sends an email to LSF stating that CDS approves the amount for the invoice. If any errors on CDS’ part are found, CDS corrects these and submits amended service data. If any errors on LSF’s part of discovered, the DSM (or data analyst) will communicate these to the LSF contract manager for correction to the invoice. LSF will then generate an amended invoice for CDS to review. Once the DSM communicates approval of the invoice amount to LSF, LSF will then generate payment to CDS. A copy of the final invoice is sent to the Comptroller and the original is maintained on file by the data department.
* **Internal-** Lastly, CDS generates performance reports that show each Prevention Specialist's hours against their expected hours to monitor whether or not CDS is drawing down the contract amounts as expected. Monthly and YTD amounts and number of units invoiced are also presented on the performance report. These reports are reviewed monthly by the executive management team.
* Note – SAMH invoices are billed on units of service but the total invoice for one month cannot exceed 1/12th of the annual total. Any excess is carried over to the next month.