



FYs 2023 and 2024 LPHA Local Government Investment Data Collection

Training Sessions
September 5 and 10, 2024

SUBMISSION DEADLINE:
5:00 p.m.
October 15, 2024

Overview of Instructions/Guidance

- Public Health Modernization Funding Formula
- Purpose of FYs 2023 and 2024 Data Collection
- Data Being Collected
- Excluded Data
- Step by Step Process for Reporting Data
- Certification
- Timeline

Public Health Modernization Funding Formula

ORS change allows for matching funds to incentivize county investment in public health through matching funds component

Preparation to turn “on” matching component of funding formula



Matching funds not turned “on” due to insufficient allocation amount

Possible first matching component distribution (depends on final allocation)

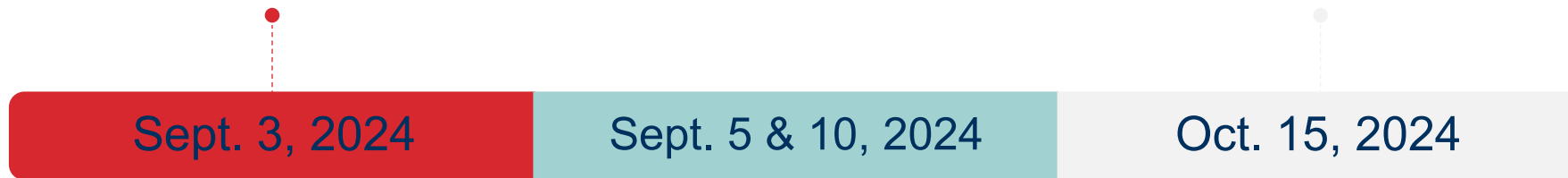
Purpose of Data Collection:

- Need to track county government investments for matching funds component of the funding formula activation
- In 2025-2027, if LPHAs receive a total additional allocation of \$2.35M and an LPHA maintains local investment (no decrease) between FY 2023 and FY 2024, matching funds will be awarded.
- FY 2023 will be the baseline data point
- FY 2024 will be the change measurement data point

Timeline

Instructions and form link for FYs 23 and 24 LPHA Local Government Investment Data sent to LPH Administrators

October 15, 2024 at 5:00 p.m.: All data due to OHA through online reporting tool



Two identical online meetings to orient LPH fiscal staff and administrators to reporting process

Key Documents for Data Collection Process:

- These instructions/guidance (sent with invitation email)
- Inclusions and Exclusions Document (sent with invitation email)
- Data Worksheet (sent with invitation email)
- Narrative, In-Kind Information and Certification Forms for FY 2023 and FY 2024 (sent with invitation email)

- Link to reporting tool is in invitation email

Important Notes about FY 2023 and 2024 Data Request

Collecting expenditures at high level for FY 2023 and FY 2024 – Be consistent across FYs

Provide additional info about In-Kind Support as part of the Narrative and Certification Form that is uploaded

System report **MUST BE** uploaded. Data cannot be validated without it.

Timelines are critical. Less flexibility on long extensions compared to past years

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 helpful

Health FYs 2023 & 2024 LPHA Local Government Investment Data Collection Worksheet

If desired, you may use this worksheet to identify the specific numbers you need to input into the online data collection tool. Use of this worksheet is optional and is provided for your convenience. Please do not submit this worksheet to OHA.

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 or other funding 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). In-Kind Support can only be counted once and should only be included in lines #3 and #6 (as part of total).

PLEASE NOTE: Data reported should reflect only FY2023 expenditures, not FY 2023 budgeted amounts.

Local Public Health Authority _____
(you will select this from a drop-down list in the tool)

Reporting for Fiscal Year 2023 – July 1, 2022- June 30, 2023

1. Local Public Health Expenditures Paid with County General Funds \$ _____
2. Local Public Health Expenditures Paid with County Other Funds \$ _____
3. Total In-Kind (non-Cash) Support from County \$ _____
4. Total Local Government Public Health Investment (Line 1 + Line 2 + Line 3) \$ _____

This worksheet is just a tool. Do not submit this worksheet with your [data](#)

Health FYs 2023 & 2024 LPHA Local Government Investment Data Collection Worksheet

5. Exclusions (see guidance documents for more information) \$ _____
6. FY 2023 Total Local Government Public Health Investment Minus Exclusions (Line 4 - Line 5) \$ _____

Reporting for Fiscal Year 2024 – July 1, 2023- June 30, 2024

1. Local Public Health Expenditures Paid with County General Funds \$ _____
2. Local Public Health Expenditures Paid with County Other Funds \$ _____
3. Total In-Kind (non-Cash) Support from County \$ _____
4. Total Local Government Public Health Investment (Line 1 + Line 2 + Line 3) \$ _____
5. Exclusions (see guidance documents for more information) \$ _____
6. FY 2024 Total Local Government Public Health Investment Minus Exclusions (Line 4 - Line 5) \$ _____

FYs 2023 and 2024 File Attachments (Naming Convention: **LPHA_FYXXXX_DocumentName**)

Upload Narrative, In-Kind Information, Certification Form and System Report

Submitter Email (this is who you want the main point of contact for Submitted information) _____

Do you want a copy of your responses? _____ Yes _____ No

This worksheet is just a tool. Do not submit this worksheet with your [data](#)



FYs 2023 & 2024 LPHA Local Government Investment Data Collection

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Year 2023

Reporting for Fiscal Year 2023 - July 1, 2022- June 30, 2023

Please note:
Data reported should reflect only FY2023 expenditures, not FY 2023 budgeted amounts.

Select Local Public Health Authority name from the drop down list *

1. Local Public Health Authority Expenditures Paid with County General Funds *

2. Local Public Health Authority Expenditures Paid with County Other Funds *

3. Total In-Kind (non-Cash) Support from County *

4. Total Local Government Public Health Investment (Line 1 + Line 2 + Line 3) *

5. Exclusions (see guidance documents for more information) *

6. Total Local Government Public Health Investment Minus Exclusions (Line 4 - Line 5) *

Year 2024

Reporting for Fiscal Year 2024 - July 1, 2023- June 30, 2024

Please note:
Data reported should reflect only FY2024 expenditures, not FY 2024 budgeted amounts.

1. Local Public Health Authority Expenditures Paid with County General Funds *

2. Local Public Health Authority Expenditures Paid with County Other Funds *

3. Total In-Kind (non-Cash) Support from County *

4. Total Local Government Public Health Investment (Line 1 + Line 2 + Line 3) *

5. Exclusions (see guidance documents for more information) *

6. Total Local Government Public Health Investment Minus Exclusions (Line 4 - Line 5) *

File Attachments (name file with LPHA name, FY and name of document) *

Please attach the Narrative, In-Kind Information, Certification Form, and System Report

Drag and drop files here or browse files

Submitter Email *

This is the main point of contact for submitted information

Send me a copy of my responses

Submit

Powered by smartsheet
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Online Smartsheet Form

<https://app.smartsheet.com/b/form/4805239d28b94862b114e48ea62d6ee8>

Submitting Data Online

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

Health FYs 2023 & 2024 LPHA Local Government Investment Data Collection Worksheet

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Key Definitions

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Local Public Health Authority _____
(you will select this from a drop-down list in the tool)

Reporting for Fiscal Year 2023 – July 1, 2022- June 30, 2023

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3. Total In-Kind (non-Cash) Support from County \$ _____
4. Total Local Government Public Health Investment (Line 1 + Line 2 + Line 3) \$ _____

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5. Exclusions (see guidance documents for more information) \$ _____
6. FY 2023 Total Local Government Public Health Investment Minus Exclusions (Line 4 - Line 5) \$ _____

Reporting for Fiscal Year 2024 – July 1, 2023- June 30, 2024

1. Local Public Health Expenditures Paid with County General Funds \$ _____
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FYs 2023 and 2024 File Attachments (Naming Convention: ~~LPHA_FYXXXX~~ DocumentName)

Upload Narrative, In-Kind Information, Certification Form and System Report

Submitter Email (this is who you want the main point of contact for Submitted information) _____

Do you want a copy of your responses? Yes No

This worksheet is just a tool. Do not submit this worksheet with your [data](#)

Data Overview

- Two Time Periods: July 1, 2022 – June 30, 2023
 July 1, 2023 – June 30, 2024
- Only Report:
 - LPHA expenditures paid with county general funds
 - LPHA expenditures paid with county other funds (fee revenue and insurance reimbursement can be included)
 - In-Kind Support
 - Exclusions amount
 - Attach narrative and certification document
 - Contact email

Do not report any funds received from federal or state government.

LPHA fiscal staff and administrators should work closely together

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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**

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

File Attachments

- Supporting documentation is required to be uploaded into the tool and includes:
 - Accounting System Generated Report for FYs 2023 and 2024
 - Completed and Signed Narrative, In-Kind, & Certification Forms for FYs 2023 and 2024

In-kind information, narrative, and certification are required for both years since data may be used for matching funds

File Attachments (cont.)

- **Accounting System Generated Report**
 - System generated reports for FY 2023 and FY 2024
 - Corresponds with the reporting boxes for amount of LPHA expenditures paid with county general funds and county other funds
 - Can be report built from accounting system data export

File Attachments (cont.)

Narrative, In-Kind Information, & Certification Forms were attached to the 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 the online tool.
- Most often the differences would be explained by exclusions, so please note if that's 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.

- **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. Must be submitted for In-Kind Support to be counted.

- **Certification**

- Review, signed and dated by LPH Administrator and Fiscal Officer/Administrator/Manager

Data Being Collected – LPHA Expenditure Inclusions/Exclusions

FINAL 8/14/2024

Foundational Capabilities/Programs – Inclusions/Exclusions FYs 2023 & 2024 LPHA Local Government Investment Data Collection

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	Communicable Disease Control	Prevention & Health Promotion	Environmental Health	Access to Clinical Preventive Services	Emergency Preparedness & Response	Cross-Cutting Strategic Development & Leadership	Administrative and Other Indirect Costs
Included	<p>Note: If there are specific questions about whether or not a cost is included, please refer to the Communicable Disease Control section of the Public Health Modernization Manual (September 2017) to determine if the function/activity/deliverable funded is described in the manual.</p> <p>Communicable disease surveillance, investigation, intervention and control, response evaluation.</p> <p>Tuberculosis, sexually transmitted infections, HIV, food-borne illness</p> <p>School law work</p> <p>Immunization clinics to provide medical countermeasures during a public health emergency (public health emergency as defined by ORS 433.442)</p> <p>Syringe exchange program</p> <p>Personal protective equipment to support population health</p>	<p>Note: If there are specific questions about whether or not a cost is included, please refer to the Prevention & Health Promotion section of the Public Health Modernization Manual (September 2017) to determine if the function/activity/deliverable funded is described in the manual.</p> <p>Population health work focused on social, emotional and physical health and safety.</p> <p>Programs that use policy, systems, environmental change strategies to address root causes of poor health outcomes (such as educational attainment, housing, transportation, community supports).</p> <p>Programs that address contributors to chronic disease from a population health perspective such as poor nutrition, inadequate physical activity, substance use disorders, tobacco use, mental health, oral health,</p>	<p>Note: If there are specific questions about whether or not a cost is included, please refer to the Environmental Health section of the Public Health Modernization Manual (September 2017) to determine if the function/activity/deliverable funded is described in the manual.</p> <p>Identification and prevention of environmental health hazards</p> <p>Mandated regulatory inspections (food, pool, lodging, drinking water systems)</p> <p>Promotion of land use planning</p> <p>Health impact assessments</p> <p>Brownfields</p> <p>Climate and health</p> <p>Lead poisoning prevention</p> <p>Domestic well safety</p> <p>Transportation/Land Use Planning</p>	<p>Note: If there are specific questions about whether or not a cost is included, please refer to the Access to Clinical Preventive Services section of the Public Health Modernization Manual (September 2017) to determine if the function/activity/deliverable funded is described in the manual.</p> <p>Assurance of access to cost-effective clinical care</p> <p>Assurance of access to effective vaccination programs</p> <p>Assurance access to effective tuberculosis treatment programs</p> <p>Assurance access to effective preventable disease screening programs</p> <p>Reproductive health community participation and assurance of access</p>	<p>Note: If there are specific questions about whether or not a cost is included, please refer to the Emergency Preparedness & Response section of the Public Health Modernization Manual (September 2017) to determine if the function/activity/deliverable funded is described in the manual.</p> <p>Preparation for emergencies</p> <p>Response to emergencies</p> <p>Coordination and communication before and during an emergency</p> <p>Cities readiness initiative</p> <p>Public health emergency preparedness</p>	<p>This category should capture any costs that support overall infrastructure for foundational capabilities not otherwise captured in the other categories.</p> <p>In addition, sometimes an expenditure crosses more than one of the following:</p> <ul style="list-style-type: none"> Communicable disease control Prevention & health promotion Environmental health Access to clinical preventive services Emergency preparedness & response <p>OR when the expenditure is specific to supporting foundational capabilities that cross multiple program areas, this category should be used.</p> <p>Note: If there are specific questions about whether or not a cost is included, please refer to the Leadership and Organizational Competencies, Health Equity and Cultural Responsiveness, Community Partnership Development, Assessment and Epidemiology, Policy and</p>	<p>This category should capture overhead costs, not otherwise reported in the other categories. These may include:</p> <ul style="list-style-type: none"> Rent Utilities Information Technology Human Resources Accounting services Facilities Maintenance Administrative support, not otherwise reported in the other categories Indirect charges assessed by county government that cannot be assigned to another category

Need Help?

- For content questions not covered in the documentation, contact Danna Drum at Danna.K.Drum@oha.oregon.gov
- For SmartSheet issues, contact Adelaide Mosier at adelaide.mosier@odhsoha.oregon.gov
- Documents are posted at www.healthoregon.org/lhd under “Administrative and Fiscal Guidance” on main page.

Thank you

You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact Publications and Design Section at dhs-oha.publicationsrequest@odhsoha.oregon.gov or 503-378-3486 (voice/text). We accept all relay calls.

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