



Preliminary Steps to Creating a Solid SOP

- 1. Identify a point person/people** responsible for developing & making updates to the SOP
- 2. Start with your goal: What are you setting out to do?**
 - Develop a draft RCORP Data Collection & Reporting SOP
- 3. Select a format/template:** Build your own from scratch or grab one from the internet
- 4. Define your scope:** What is the purpose of your document?
 - To clearly outline all steps in the RCORP data collection and reporting process, including: PIMS measures relevant to each consortium member, frequency of reporting, responsible parties, standards for communication with consortium member around obtaining data, performing data checks, submission in EHBs



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4. **Identify your audience:** Who are you writing this SOP for?
 - Data Coordinator, Project Director, other evaluators/staff providing support
5. **Gather information:** Meet with the people doing the work and document how they are doing it
 - For instance: schedule meetings with your data staff to learn about current processes in place for data collection and reporting
6. **Create your outline + write your first draft**
 - Reach out to the Eval team, TEL and PO if you'd like feedback
7. **Review with your team + adjust based on staff feedback**
8. **Implement!**



Developing Your Data Collection & Reporting SOP

- ✓ **Title:** Name your document
- ✓ **Scope of SOP:** Use the purpose language you developed in preliminary steps
- ✓ **Glossary & Acronyms:** Especially helpful for new staff
- ✓ **Processes/Checklists:** The core component of your document
 - ✓ Multiple sections to reflect different processes/tasks
 - ✓ Identify responsible parties

RCORP Data Collection & Reporting SOP

Consortium: River Ridge Health Partners

Version/Date: 1.2; 7/2023

Primary Point of Contact: Dani Lloyd, JBS International, dlloyd@jbsinternational.com

Secondary Point of Contact: Stephen Crowe, JBS International, scrowe@jbsinternational.com

Section 1: REVIEW OF APPLICABLE PROGRAM DOCUMENTS/RESOURCES

Task	Details of task	Relevant resources	Frequency	Responsible Party	Date Completed
1.1 Review all PIMS measures and applicable guidance specific to grant	a. Review all PIMS measures and guidance specific to the Behavioral Health Care Support grant. Information can be found on the PIMS Data Collection Resource page linked in cell C10	https://www.rcorp-ta.org/sites/default/files/2023-05/DataCollectionResource_BHSGrantProgram_April%202023_for%20formatting_508_V2_ts.pdf	Minimum of annually prior to each reporting period	DL; SC	4/20/2022
1.2 Identify the activities and metrics each consortium member will be responsible for reporting out on	a. Locate the most up to date version of your RCORP work plan and PIMS Data Collection Resource b. Review webinar on how to do a crosswalk of work plan and PIMS guidance. See link to webinar and resources in cell	https://www.rcorp-ta.org/resources/your-rcorp-workplan-key-component-pims-	Annually/		

Primary SOP

Acronyms

PIMS measures

Org chart



0 1.3 Once all activities and associated metrics are identified, share with each consortium member so they are aware of which metrics they must report out on	webinar a. Develop a document for each consortium member clearly outlining the activities they are conducting and the metrics they are expected to report b. Email documents to consortium members and inform them a meeting will be scheduled to review the activities and metrics	process	necessary	DL	4/25/2022
1	a. Send out a Doodle poll to all consortium members 1 month prior to anticipated meeting date/time b. Choose date that is best based on availability c. Prepare presentation 1 week in advance		Annually/a	DL	5/1/2022

	A	B	C	D	E	F
13	Section 2: COLLECTION OF RCORP PIMS DATA FROM CONSORTIUM MEMBERS					
14	Task	Details of task	Relevant resources	Frequency	Responsible Party	Date Completed
15	2.1 Develop data collection tool to be used for gathering data from consortium members					
16	2.2 Hold a training for consortium members on utilizing the tool, to address troubleshooting, and elicit feedback					
17	2.3 Update tool as needed after feedback from consortium members					
18	2.4 Send 1st reminder email to consortium members in advance of PIMS due date					
19	2.5 Review data as it it is received by consortium members					
20	2.6 Respond to consortium members with questions/clarifications as needed					
21	2.5 Send 2nd reminder if needed					
22	2.6 Review any corrected data received					
23	2.7 Complete all data checks					
24	2.8 Submit data in EHB by due date					



Additional tips

- **Schedule regular reviews** of the SOP to update as needed
- Incorporate the SOP into **staff development/training**
 - Be open to **feedback from staff** and make changes as needed
- **Use visuals and checklists** to make the document easier to follow and utilize



Save the Dates

August 2023

PIMS Data Office Hours

- **Tuesday, August 8th: 3-4pm ET**
- **Wednesday, August 23rd: 4-5pm ET**

<https://us02web.zoom.us/j/86536247502?pwd=VGJHeGFnMlhDK0o3eDFmQlp6UDhjdz09>