

SAPC Value-Based Incentives Package
Building Performance and Risk Metrics (1-A)
Data Aggregation Implementation Completion Plan (Option 1)

Purpose: The Data Aggregation Implementation Plan will help provider agencies develop a structured, actionable roadmap for implementing a data aggregation platform. It builds on the Data Aggregation Readiness Assessment and is required for Submission 3 of the Value-Based Incentive, Building Performance and Risk Metrics (1-A), due **March 31, 2026**.

Instructions: Fill in the tables below with the requested information, including supporting documentation where noted. If the sections below do not fully address your agency's needs, please use Section 3 at the end of the document to provide any additional information.

Agency Profile & Contact Info:

Provider Agency:	
Provider Representative Name:	
Email:	
Phone Number:	
Date Completed:	

Please confirm your submission option below:

- Option 1:** Purchase data aggregation platform software and initial implementation

Implementation Status: What is your agency's implementation status as of March 31, 2026? Please select one of the following options:

- Software purchased, implementation & PAC Metrics development complete
- Software purchased, implementation & PAC Metrics development in progress

If you have already purchased a software, when did you purchase it?

- Before FY 2025-26
- During FY2025-26

SECTION 1: PURCHASE AND INITIAL IMPLEMENTATION CHECKLIST (OPTION 1 ONLY)

This checklist contains the documentation that provider agencies must provide to demonstrate proof of purchase, initial implementation, and/or ongoing use of data aggregation platform software that meets the requirements of the Building Performance and Risk Metrics VBI.

This checklist and any supporting documentation are required for **Option 1: Purchase data aggregation platform software and initial implementation.**

What data aggregation platform software have you selected for purchase and implementation?

Proof of Purchase or Ongoing Use: Provider agencies must demonstrate the purchase or current use of a data aggregation platform that meets the incentive requirements. Check the boxes below to indicate which supporting documents will be provided, along with the title of the respective file(s).		
Data Aggregation Platform <u>purchased in FY 2025-26</u>. The below documentation is required to meet the criteria under Option 1.		
Item	Provided?	Supporting Documentation Title
Proof of <u>recent</u> purchase and/or service agreement for the data aggregation platform		
Data Aggregation Platform <u>purchased before FY 2025-26</u>. At a minimum, one of the below forms of documentation is required to meet the criteria under Option 1.		
Item (Choose One)	Provided?	Supporting Documentation Title
Proof of purchase and/or service agreement for the data aggregation platform	<input type="checkbox"/>	
OR Executed contract, service agreement, or scope of work	<input type="checkbox"/>	
OR Proof of payment	<input type="checkbox"/>	
OR Renewal or Subscription Notice	<input type="checkbox"/>	
OR Other (please specify)	<input type="checkbox"/>	

Proof of Initial Implementation: Provider agencies must demonstrate that, at a minimum, the initial technical implementation of the data aggregation platform is underway and active.

All components below must be completed to meet Option 1 criteria.

Activity	Complete?	Supporting Documentation Title
Platform/software has been installed, built, or launched.	<input type="checkbox"/>	
User access accounts have been established for the first round of key agency staff.	<input type="checkbox"/>	
At least one primary data source per each category has been identified and mapped to the data aggregation platform.	<input type="checkbox"/>	
Configuration and setup activities are in progress.	<input type="checkbox"/>	

Documentation of Metrics Dashboard Development:

- Provide **supporting documentation** demonstrating that a dashboard with at least **7 of the 10 required metrics** for this VBI are complete. **A minimum of 7 metrics is required to meet the initial implementation criteria for Option 1.**
 - For the 7 **complete** metrics, provide finished visuals (eg. graphs, charts, dashboards).
 - For metrics **in progress**, include snapshots of progress in the data aggregation platform (table, mappings, crosswalks).
 - Your agency may also elect to share the full dashboard with SAPC.
- API connections are strongly encouraged but not required to meet the Option 1 initial implementation criteria. The status question is included for informational and planning purposes.

Metric	Development Status? (required: at least 7 are complete)	What is the status of creating an API Connection?	Supporting Documentation Title	For metrics that have not yet been completed:	
				Plan for incorporating metric into the dashboard	Start Date and End Date
Operating Costs as Percent of Revenue					
Percent Increase in DMC Revenue					
Percent of Claim Approvals in the First Billing Cycle					
Cost-Per-Client					
Billable Time					
Client Retention Rate					
SUD Counselor-to-Client Ratio					
LPHA-to-Client Ratio					
Staff Retention by Role Type (1, 3, and 5 Years)					
No-Show Rates for Intake Appointments					

SECTION 2: IMPLEMENTATION OVERVIEW

This section contains key project details related to data aggregation implementation. Section 2 is required for all submissions.

Personnel Summary: List any internal or external stakeholders involved in the data aggregation platform purchase and/or implementation process. A sample project team is provided below. Actual roles and quantities may vary. Feel free to refer to your Data Aggregation Readiness Assessment and make changes only as needed.			
Role (Definitions Below)	Name	Job Title	Responsibilities

Role Definitions:

- **Executive Sponsor:** Provides overall direction, resources, and support for the project. Ensures alignment with organizational priorities and approves major decisions, scope changes, and final deliverables.
- **Project Lead:** Oversees day-to-day project planning and execution. Manages timelines, deliverables, and communication among stakeholders to ensure the project stays on schedule and within scope.
- **Developer:** Designs and builds the technical components of the project, working in close collaboration with the project lead and other team members.
- **Team Member:** Contributes subject-matter expertise and completes assigned tasks or deliverables. Collaborates with other team members as needed to support project completion.
- **Partner / Vendor:** Provides outside products, services, or expertise that support project completion. Includes, but is not limited to, software vendors, external developers, or external advisors.
- **Other:** Any other title that helps clarify the team member’s role in the project.

Project Communications: Any reporting, meetings, or other communication methods in place to support timely and accurate project completion.			
Comm. Method	Description	Frequency	Audience

Sample Communications Methods:

- **Status Report:** Recurring written update summarizing accomplishments, upcoming tasks, barriers, and risks.
- **Internal Meeting:** Can vary from high-level stakeholder briefs to weekly operational check-ins.
- **External Meeting:** Applicable if contracting with external vendors.
- **Project Management Platform:** Live task tracking via spreadsheets, whiteboards, or any other platforms.

Implementation Completion Plan Questionnaire

1. What data aggregation platform did your agency invest in? Please describe any ancillary software products or services required to support implementation.
2. Please describe your current stage of implementation. What components have been completed, and what remains outstanding?
3. What is your agency's timeline for completing **full implementation**? Please provide a specific date (month and year) for when full implementation will be completed.
4. How will your agency ensure ongoing use of your platform, including any maintenance and/or updates as organizational needs evolve?

Other Reflection Questions

1. **Risk Identification:** Describe two to three of the top risks that may affect timely or satisfactory implementation based on the goals set by the Data Aggregation Readiness Assessment and/or the above implementation plan. What impact do these risks have on the overall project?
2. **Risk Mitigation:** How will your agency mitigate the risks described above?

SECTION 3: ADDITIONAL INFORMATION (OPTIONAL)

Certain tables or questions in the Data Aggregation Implementation Plan may not have sufficient space to capture your response. In the text box below, please provide any additional information that can supplement your responses to the questions above. Please reference the respective section number and table name / question number in your responses.