OST Administrative Review Process for FY 2027

Background:

Public Health Management Corporation (PHMC) serves as the intermediary for the City of Philadelphia, Office of Children and Families' (OCF) Out of School Time Project (OST). These initiatives support nearly 400 unique programming opportunities and provide over 25,000 total seats for youth in grades K-12 throughout the city. These initiatives aim to provide quality out-of- school time programming to improve life skills, increase academic engagement, and prepare youth for higher education and employment.

PHMC is offering two options for the administrative review:

1. **Remote** – Documents are scanned as PDFs and uploaded to Cognito and to Cityspan (Staff Clearances); the provider participates in a remote review meeting, and complete attestations about adherence to document storage and maintenance practices regarding PA DHS required documents.

2. **On-site** – The provider and their PHMC Contract Specialist (CS) identify a mutually agreeable location for the review (may be located at the provider's location or files can be delivered to PHMC). Documents are made available to PHMC for review; the provider participates in a remote review meeting, and complete attestations about adherence to document storage and maintenance practices regarding PA DHS required documents. Providers selecting this option must email their request to their assigned Contract Specialist **by Friday, January 15th**.

What is the Goal of the Administrative Review?

The administrative review provides an opportunity to assess the contract and compliance performance of OST programs funded by PHMC. The review process is part of a unified accountability system designed to ensure that OST providers are meeting contractual requirements. The process allows PHMC to validate the quality of data entered into required data systems and identify and remediate any contractual or fiscal risks. This process should support agency continuous quality improvement (CQI) efforts, trigger technical assistance (TA) from the OST program team when needed, and inform internal decision making. There are no immediate financial implications for the initial review findings. Egregious findings will be referred for additional auditing, may result in corrective action activities, and may impact current and future contract status.

The process for providers that are PA DHS licensed will be streamlined to prevent duplication of review.

What Will Be Reviewed?

The administrative review will include review of staff and child files, attendance records, program expenses, required site documents, and organizational contract forms. PHMC will also be reviewing data found in the Cityspan DHS Participant Compliance Report – All Enrolled to ensure participant data, required uploads, and consents are present.

Site and Organizational Contract Documents Compliance Review

Providers will need to provide the following documents for review:

- ✓ **Site Documents**
  - Emergency Preparedness Plan
  - PA DHS Certification (General Strategy, ES and/or MS providers only)
- ✓ **Organizational Contract Documents**
  - 501c3 Designation Letter
  - If applicable: updated W9
  - Board List Verification

Staff Compliance Review

PHMC will expect that all staff listed on quarter 1 and/or 2 expense reports who work directly with youth will have required clearances available in Cityspan. Providers are encouraged to review their Cityspan data for accuracy prior to the review.

Staff Records

Providers MUST have all staff records available for any employees, volunteers, or consultants active during the current contract fiscal year that are funded by the OCF program budget, who worked directly with children, and contributed toward client/staff ratio levels.

All staff files will be reviewed. Consultants who are affiliated with an outside organization and provide services to the OST program as a representative of that agency are not required to have documentation on-site. However, consultants who provide services as individuals and not as representatives of an outside organization are required to have documentation on-site.

Providers will need to provide the following documents from every staff file for review:

- ✓ **Health Assessment**
  - **TB test results** (new staff)
- ✓ **Staff Clearances and Verifications**
  - **Criminal Record Clearance** (must be uploaded into Cityspan)
  - **Child Abuse Clearance** (must be uploaded into Cityspan)
  - **FBI Clearance** (must be uploaded into Cityspan)
  - **National Sex Offender Registry (NSOR) Verification (**must be uploaded into Cityspan; applicable to General Strategy ES and/or MS programs only)
  - **Signed Confidentiality Form**
  - **Mandated Reporter Training Completion Certificate**

Please note: Where relevant, copies of clearance requests should also be available (i.e. if a backlog in the clearance process has delayed completion for new hires). This does not replace the requirement for Providers to have clearances on file prior to staff working with children.

FY 2027 Expense Review

The following item will be reviewed:

- ✓ **Quarter 1 & 2 Payroll Reports** for all staff charged to the FY2027 OST Budget, indicating minimum staff salaries and hourly pay rates identified in the FY2027 SOPs are met or exceeded.

The Payroll Reports will be used to cross-check against the following:

- ✓ All staff listed on Payroll Report working directly with children must have Staff Profiles set up in Cityspan containing required clearances.
- ✓ Staff listed on payroll report must align with staff listed on quarter 1 and/or quarter 2 expense reports.

Youth Records Compliance Review

Providers MUST always have all youth records available for review for any clients active during the current contracted fiscal year. For the review process, the CS will review the records for 5 youth selected by the provider at each site. Providers will need to supply the following documents from each of the five child files for review:

- ✓ **Health Assessment** (note: shot records do not qualify as health assessments)
- ✓ **Emergency Contact Form** (dated 9/1/2026 or later.)
- ✓ **Current Means Test Worksheet**
- ✓ **OST Consent Form** (dated within 30 days of fall enrollment)

Attendance

Providers MUST have all attendance records for participants (sign-in sheets and/or remote attendance tracking sheets) available for all invoiced months at the location of review. For the review process, the CS will review sign-in sheets for the month of December and compare attendance data for all enrolled youth.

The following attendance record items will be reviewed:

- ✓ **Attendance sheets for the month of December 2026** (or alternative month as identified by the Contract Specialist) to include:
  - Sign-In
    - All children, grades three and above, must sign themselves into the program each day with their full name and time of arrival
  - Sign-Out
    - All children and/or their parents/caregivers must sign themselves/their children out each day with their full name and time of dismissal
    - Staff may not sign out participants on behalf of children or their parents or caregivers
  - Programming dates at the top of every page

Cityspan DHS Participant Compliance Report – All Enrolled report

This report can be found in the "**DHS OST**" menu, under the "**Agency Custom Reports**" tab in Cityspan. Providers are responsible for checking for the availability of this report in Cityspan as soon as they receive this document

and should submit a ticket through the ServiceNow portal if they are unable to access it. ***Please do not wait until your Administrative Review begins to confirm the availability of this report.*** Providers are responsible for updating all participant data that is missing, highlighted in yellow, appears in red font or is otherwise incorrect.

The following columns of information found in the DHS Participant Compliance Report will be scored:

- ✓ **Column G (DOB)** – Must align with student's grade as identified in column P.
- ✓ **Column N (School)** – May not be "Other" or "Unknown"
- ✓ **Column O (Student ID #)** – For SDP students only. Please confirm accuracy of Student ID #'s with student, family, or appropriate school contact.
- ✓ **Column P (Grade)** – Must align with Program Model (column D) unless a Model Adherence Waiver has been submitted and approved. Must be grades K-12.
- ✓ **Column R (Means Test Status)** – Participants may not have "Not Entered" or "Need Updated Means Test" as a response
- ✓ **Column T (Emergency Contact Consent Date)** – Dated 9/1/2026 or later.
- ✓ **Column U (SDP FERPA Consent Date)** – Needed within 30 days of enrollment – required for public and charter school students only.
- ✓ **Column V (OST Data Sharing Consent Date)** – Needed within 30 days of enrollment; youth cannot participate in program(s) until received if not completed within the grace period.
- ✓ **Column W (Health Assessment Date)** – Due within 90 days of enrollment date, and again 90 days after student moves into new OST Model (ex. Elementary à Middle or Middle → High). Immunization records alone are insufficient.

General Strategy High School OST C2L Incentive Procedure & Distribution Logs

OST C2L providers are required to utilize a disbursement log designed to uniquely identify each youth. The logs are required to include printed and signed names of the youth recipient, the identifying number of the card that was disbursed to the client, and a signature of the employee responsible for distributing the card to the youth.

The following items will be reviewed:

- ✓ **Debit Card Distribution Procedure**
- ✓ **Summer 2026 Card Distribution Log**

What Can You Expect?

Timeline for Review

The online submission process for the FY27 Administrative Review period will open on Monday, January 11th, 2027, **and conclude at close of business on Friday, February 5th, 2027.** Providers should immediately begin their internal review of all organizational, staff, and child files to ensure that they are ready for review.

Key Dates:

- Providers are required by the SOP to update Cityspan Staff profiles each month prior to invoice submission and ensure all required clearances and the mandated reporter training are available for review.

PHMC is contacting providers regularly from ost@phmc.org in advance of the FY27 Administrative Review to offer targeted supports according to the following schedule:

Date of Communication	Sent From	Subject
11/30/2026	ost@phmc.org	Daily Attendance Sheets
12/7/2026	ost@phmc.org	Cityspan DHS Participant Compliance Report
12/14/2026	ost@phmc.org	Cityspan DHS Staff Compliance Reports
12/21/2026	ost@phmc.org	Participant File Uploads in Cognito

- **Monday, January 11th:** Providers may begin uploading required documents into Cognito, allowing the provider 5 business weeks to ensure all required documents are submitted.
    - For staff records and site/organizational documents, providers should use the following link: https://www.cognitoforms.com/PHMC1/OSTFY27RecordReviewOrganizationStaffFiles
    - For child records, attendance and expense review, providers should use the following link: https://www.cognitoforms.com/PHMC1/OSTFY27RecordReviewClientFilesExpenseReview
- **Friday, January 15th:** Providers requesting an on-site review must do so by emailing the request to their Contract Specialist by this date. All on-site reviews will be conducted during the week of February 8th.
- **Thursday, January 14th @ 11:00 am**: Online Technical Assistance session offered to support Admin Review process. Register HERE.
- **Wednesday, February 3rd @ 11:00 am:** Online Technical Assistance session offered to support Admin Review process. Register HERE.
- **Friday, February 5th at 11:59pm:** Cognito submission portals close. Failure to submit by this time will result in initial scores of 0 for all unsubmitted items.
- **Friday, March 12th**: PHMC Contract Specialists will issue scorecards to providers no later than this date.
- Providers will be allowed 2 weeks from receipt of their scorecard to resubmit missing or incomplete documents during a subsequent Performance Improvement Plan.
- **Friday, May 14th:** PHMC Contract Specialists will issue final scorecards to providers no later than this date. *PHMC may take immediate action upon completion of the Administrative Review Final Scorecard to conduct an additional on-site review, which may expand the initial review, if findings present health and safety concerns or are otherwise particularly egregious. Such findings may result in corrective action activities up to and including shifting the provider contracts into conditional status. These organizations may be subject to mandatory on-site reviews in future Administrative Reviews.*

Staff Contact Information:

For questions or additional information please contact your Contracts Specialist directly at:

- Delores Fuqua: dfuqua@phmc.org or (267) 780-9249
- Leslie Robinson Brown: lrbrown@phmc.org or (267) 443-8351
- Steven Rodriguez: strodriguez@phmc.org or (215) 936-1003
- Huan Baum: hbaum@phmc.org or (445) 321-1425

Providers may also include the following staff on any communications pertaining to the Administrative Review:

- Angie Lopez, OST Contracts Manager, anlopez@phmc.org
- Rob Lairmore, Sr. Operations Manager, rlairmore@phmc.org