**Title X Subrecipient Onboarding Work Plan: Phase 1**

**Purpose:** The purpose of this tool is to help Title X grantees plan, communicate, and implement an onboarding process for new Title X subrecipients.

**How to use:** Insert grantee and subrecipient information where indicated. As needed, customize the suggested Phase 1 goals, action steps, and tasks to meet your and/or your subrecipient’s unique needs. For each task, determine the timeline for completing the task, who is responsible for completing it, and how you will know whether the task has been completed. For an overview of onboarding, refer to [Onboarding New Title X-Funded Agencies: A Toolkit for Grantees](https://www.fpntc.org/resources/onboarding-new-title-x-funded-agencies-toolkit-grantees).

*[Insert* ***Grantee Name/Logo****]*

*[Insert* ***Grantee Contact Name and Contact Information****]*

*[Insert* ***Subrecipient Agency Name****]*

*[Insert* ***Subrecipient Contact’s Name and Contact Information****]*

| Phase 1 Goal: During the first phase of onboarding, the grantee and subrecipient identify staffing and existing resources. The grantee provides education and training on Title X program requirements, Quality Family Planning Recommendations (QFP), and other guidance; communicates expectations to the subrecipient; assesses the subrecipient’s current practices; and uses assessment findings to develop a work plan. |
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**Action Step 1: Organize Phase 1 onboarding work.**

| Timeline | Task | Responsible | Indication of Completion  |
| --- | --- | --- | --- |
|  | Identify clinical, administrative, and fiscal representatives from the grantee and subrecipient to form an onboarding steering committee. Steering committee members can then form discipline-specific teams that report back to the steering committee. |  | Completed spreadsheet with steering committee and discipline-specific team members’ names, roles, and contact information |
|  | Fill in Subrecipient Onboarding Phase 1 Work Plan tasks, timelines, and responsible individuals. |  | Filled in Phase 1 Work Plan  |
|  | Distribute the Subrecipient Onboarding Phase 1 Work Plan to team members and others as necessary. |  | Documentation of distribution |

**Action Step 2: Provide an overview of the onboarding process to the grantee and subrecipient steering committee and discipline-specific teams.**

| Timeline | Task | Responsible | Indication of Completion  |
| --- | --- | --- | --- |
|  | Review [Tips for Supportive Monitoring Practices](https://www.fpntc.org/resources/tips-supportive-monitoring-practices) with the grantee onboarding team**.** |  | Documentation of review |
|  | Use the [Title X Subrecipient Onboarding Overview](https://www.fpntc.org/resources/title-x-subrecipient-onboarding-overview), to provide an overview of the onboarding process to the subrecipient.  |  | Documentation of review |
|  | Establish regular meetings for the steering committee and with each discipline-specific team.  |  | Meeting schedules |

**Action Step 3: Assess the status of subrecipient compliance with Title X policies, and administrative, clinical, and fiscal requirements. Use the results of these assessments to tailor the onboarding process to meet the unique needs of the subrecipient agency.**

| Timeline | Task | Responsible | Indication of Completion  |
| --- | --- | --- | --- |
|  | Use the [Title X Subrecipient Policy Assessment and Onboarding Checklist](https://rhntc.org/resources/title-x-subrecipient-policy-assessment-and-onboarding-checklist)s to assess which Title X requirements the subrecipient has in place and which they need to work on.  |  | Documentation of initial assessment  |
|  | Use the [Title X Subrecipient Administrative Assessment and Onboarding Checklist](https://rhntc.org/resources/title-x-subrecipient-administrative-assessment-and-onboarding-checklist)s to assess which Title X requirements the subrecipient has in place and which they need to work on. |  | Documentation of initial assessment |
|  | Use the [Title X Subrecipient Clinical Assessment and Onboarding Checklist](https://rhntc.org/resources/title-x-subrecipient-clinical-assessment-and-onboarding-checklist)s to assess which Title X requirements the subrecipient has in place and which they need to work on. |  | Documentation of initial assessment |
|  | Use the [Title X Subrecipient Fiscal Assessment and Onboarding Checklist](https://rhntc.org/resources/title-x-subrecipient-fiscal-assessment-and-onboarding-checklist)s to assess which Title X requirements the subrecipient has in place and which they need to work on. |  | Documentation of initial assessment |
|  | Create a plan with the subrecipient for completion of outstanding checklist items with deadlines. |  | Documentation of outstanding items and deadlines for completion  |

**Action Step 4: If the subrecipient is not already enrolled in the 340B Drug Pricing Program, provide resources and encourage them to start the enrollment process as soon as possible.**

| Timeline | Task | Responsible | Indication of Completion  |
| --- | --- | --- | --- |
|  | Provide the subrecipient with the [340B Drug Pricing Program Frequently Asked Questions](https://www.fpntc.org/resources/340b-drug-pricing-program-frequently-asked-questions) job aid to provide a quick overview of 340B and the [Apexus Sample Policy and Procedure Manual for Family Planning](https://www.fpntc.org/resources/apexus-sample-policy-and-procedure-manual-family-planning) to assist with 340B policy development.  |  | Documentation of 340B enrollment, 340B policies and protocols approved by grantee |

**Action Step 5: Provide the subrecipient with education and training to address gaps identified in the assessment above.**

| Timeline | Task | Responsible | Indication of Completion  |
| --- | --- | --- | --- |
|  | Provide education and training on [Title X Statutes, Regulations, and Legislative Mandates](https://opa.hhs.gov/grant-programs/title-x-service-grants/title-x-statutes-regulations-and-legislative-mandates)and[QFP](https://www.cdc.gov/reproductivehealth/contraception/qfp.htm). |  | Training plan, confirmation of training completion |
|  | Using the [Understanding the Total Program Concept](https://www.fpntc.org/resources/understanding-total-program-concept), ensure the subrecipient’s administrative and fiscal staff understand the total program concept, which is key to complying with reporting requirements. |  | Meeting minutes |

**Action Step 6: Support the subrecipient in adhering to reporting and documentation requirements.**

| Timeline | Task | Responsible | Indication of Completion  |
| --- | --- | --- | --- |
|  | Using the [Preparing Your EHR for FPAR](https://www.fpntc.org/resources/preparing-your-ehr-fpar) guidance, work with the subrecipient to prepare a plan for compiling the Family Planning Annual Report (FPAR) that includes firm data submission deadlines. |  | FPAR plan (with data submission deadlines)  |
|  | Ensure the subrecipient has access to the grantee’s FPAR data reporting system and the [Title X Family Planning Annual Report Forms and Instructions](https://www.hhs.gov/opa/sites/default/files/fpar-forms-instructions-reissued-oct-2016.pdf).  |  | Subrecipient confirmation of system access |
|  | Schedule meetings with the subrecipient’s electronic health record (EHR) and IT staff as needed to ensure steady progress toward FPAR data submission. |  | Meeting schedule and meeting minutes |
|  | Review the EHR to ensure that the Title X-required documentation fields outlined in the [Title X Subrecipient Administrative Assessment and Onboarding Checklist](https://www.fpntc.org/resources/title-x-subrecipient-onboarding-checklist) exist. |  | Documentation of required fields (such as screenshots or an IT report describing the fields)  |

**Action Step 7: Support the subrecipient in providing required staff training.**

| Timeline | Task | Responsible | Indication of Completion  |
| --- | --- | --- | --- |
|  | Orient the subrecipient to required Title X training topics by reviewing the [Federal Title X Training Requirements Summary](https://www.fpntc.org/resources/federal-title-x-training-requirements-summary) with them.  |  | Documentation of orientation |
|  | Orient the subrecipient to the [Family Planning National Training Center (FPNTC)](https://www.fpntc.org/) and [National Clinical Training Center for Family Planning (NCTCFP)](http://www.ctcfp.org/) training resources.  |  | Documentation of orientation |
|  | With the [Using the FPNTC Website to Track Your Network’s Training Completion Job Aid,](https://www.fpntc.org/resources/using-fpntc-website-track-your-networks-training-completion-job-aid) orient the subrecipient to the FPNTC Training Tracking System or provide guidance on how to track training. |  | Documentation of orientation, tracking plan |
|  | Confirm that the subrecipient has a plan for staff to complete all required Title X training. |  | Training plan |