**Title X Site Visit Agenda Template**

**Purpose:** This sample agenda can be adapted and used for site visits. It is designed for a two-and- a-half day site visit with the third half-day dedicated to preparation for and conducting the exit meeting; site visit observations are discussed with the subrecipient during this meeting. The specific number of days, locations, and agenda for reviews will differ from agency to agency. Grantees can modify the original agenda for each additional service site, if necessary.

**How to use**:Insert the grantee’s name and logo, subrecipient information, and other details where indicated and as needed.

[*insert* ***Grantee Name/Logo***]

**Title X Site Visit Agenda**

**Administrative Office Review**

[***Dates***]

Day 1 [***Date***]

[***Day 1 Administrative Office Location***]

Grantee contact: [***Grantee Contact Person’s Name and Phone Number***]

Subrecipient contact: [***Subrecipient Contact Person’s Name and Phone Number***]

|  |  |  |
| --- | --- | --- |
| **Time** | **Activity** | **Notes** |
| 8:00–10:00 | Site visit team travels to subrecipient administrative offices |  |
| 10:00– 10:30 | Entrance meetingWelcome and introductions, overview of the Title X site visit process for staff at the administrative office. Subrecipient overview of its Title X project. | * Include all administrative, fiscal, and clinical staff at the administrative location involved in the review.
 |
| 10:30– 10:45 | Tour of administrative offices |  |
| 9:45–12:00 | Document review and interviews with subrecipient | * Reserve a private room for the site visit team.
* Have requested documents available on-site.
* Have requested personnel files on- site.
* Make sure the following people are available to answer questions:
	+ family planning program manager
	+ billing staff
	+ finance staff
	+ staff responsible for Information and Education materials review process
	+ staff responsible for Community Participation, Education, and Program Promotion
 |
| 12:00– 12:30 | Lunch |  |
| 12:30–3:30 | Document review and subrecipient staff interviews, continued.  | * Have medical director or lead clinician available for 30-minute discussion with clinical reviewer (can be done over the telephone).
 |
| 3:30–4:00 | Day 1 debrief with subrecipient staff | * Include all administrative, fiscal, and clinical staff who were involved in the review at the administrative site.
 |
| 4:00–5:30 | **Site visit team** debrief and drive to Day 2 location (if applicable) | [***Site Visit Team Travel/Hotel Information***] |

**Clinical Location Review**

Day 2 [***Dates***]

[***Day 2 Service Site Location***]

Service site contact: [**S*ervice Site Contact Person’s Name and Phone Number***]

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| **Time** | **Activity** | **Notes** |
| 9:00–9:20 | Welcome and introductions, **overview of the Title X site visit process for staff at this service site location if different from Day one location** | * Include all administrative, fiscal, and clinical staff involved in the review at the Day 2 location.
 |
| 9:20–9:35 | Tour of Day 2 location |  |
| 9:35–12:00 | Site visit team conduct document review, chart audit, client observations, and staff interviews | * Reserve a private room for the site visit team.
* Have requested documents available on-site.
* Have requested personnel files available on-site.
* Print the clinic schedule for clinical reviewer, so they can plan for client observations.
* If using an electronic health record (EHR), have a staff member who is highly skilled in the use of the EHR available during the review to assist the clinical reviewer as they complete the chart audit.
* Make sure the following people are available to answer questions:
	+ family planning program manager
	+ billing staff
	+ front desk staff
	+ clinical staff
	+ staff that provide client education
	+ staff responsible for Information and Education materials review process
	+ staff responsible for Community Participation, Education, and Program Promotion
 |
| 12:00– 12:30 | Lunch |  |
| 12:30– 4:00 | Site visit team continue document review, chart audit, client observations, and staff interviews |  |
| 4:00–4:30 | Day one debrief with subrecipient staff | * During this debrief, the site visit team will provide a brief summary of its impressions. Include all administrative, fiscal, and clinical staff who were involved in the review at the Day 2 site.
 |
| 4:30–5:30 | **Site visit team** drive to Day 3 location | [***Site Visit Team Travel/Hotel Information***] |

**Exit Meeting**

**[*Day 3 Location***]

|  |  |  |
| --- | --- | --- |
| **Time** | **Activity** | **Notes** |
| 9:00–10:30 | **Site visit team** exit meeting preparation | * This meeting is an opportunity for the site visit team to meet privately and prepare for the exit meeting; it may be conducted off-site.
 |
| 10:30– 12:00 | Exit meeting | * Include the administrative, fiscal, and clinical staff who were involved in the review.
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