**Title X Site Visit Report Template**

**Purpose:** This template provides a structure for site visit reports and can be customized.

**How to use:** Insert the grantee’s name and logo, subrecipient information, and other details where indicated and as needed. Remove the two example findings from the “Findings and Corrective Actions” table and replace with findings from the applicable site visit. Add rows for reports with more than two findings. Reports should be sent as a package with the [Site Visit Cover Letter](https://www.fpntc.org/resources/title-x-program-review-report-cover-letter-template) and [Corrective Action Plan](https://www.fpntc.org/resources/title-x-corrective-action-plan-cap-template).

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

Report Date: [***Report Date***]

Site Visit Dates: [***Site Visit Dates***]

Subrecipient: [***Subrecipient and Site/Sites Reviewed***]

Site Visit Team Members:

Site visit review team lead: [***Site Visit Lead’s Name***]

 Administrative lead: [***Administrative Lead’s Name***]

 Clinical lead: [***Clinical Lead’s Name*]**

 Fiscal lead: [***Fiscal Lead’s Name***]

 Other [***Role of Other***]: [***Other Relevant Reviewer’s Name***]

Site Visit Participants (include all administrative, clinical, fiscal, billing, front desk, and other staff who were interviewed or observed as part of the site visit at the administrative and clinical site(s):

 [***Participant Title/Role***] [***Participant Title/Role***]

[***Participant Title/Role***] [***Participant Title/Role***]

[***Participant Title/Role***] [***Participant Title/Role***]

[***Participant Title/Role***] [***Participant Title/Role***]

[***Participant Title/Role***] [***Participant Title/Role***]

[***Participant Title/Role***] [***Participant Title/Role***]

**List of Documents Reviewed:** *(Note: This list is only a sample. Each report should be customized with an actual list of documents reviewed.)*

**Title X Program Requirements Section 8 (Project Management and Administration) Related Documents**

* Family planning program policy and procedures
* Family planning financial policies and procedures
* Medical provider contract(s)
* Financial screening and eligibility determination forms and policy
* Contracts with third-party payers
* Copies of written agreements with Medicaid (Title XIX) and Title XX of the Social Security Act
* Personnel policies and procedures
* Organizational chart, including family planning program staff
* Resumes of family planning program director and medical director
* Family planning program staff job descriptions
* Documentation of medical provider licenses, prescriptive authority, and CPR certification
* Summary or client satisfaction survey results
* Staff training plan
* Staff training logs, sign-in sheets, and training reports from fpntc.org
* Quality assurance/quality improvement plan and monitoring tools

**Title X Program Requirements Section 9 (Project Services and Clients) Related Documents**

* Client bill of rights
* Clinic hours for all services sites to be visited
* Referral list and written process used for required and recommended services not provided by agency
* Written referral agreements with other health care and social service agencies
* Family planning services clinical protocols
* Staff lab skills proficiency documentation
* Family planning client medical records
* Abnormal laboratory results and follow-up documentation
* Pharmacy inventory tracking system and 340B policies (if applicable)
* State outpatient treatment and CLIA licenses

**Title X Program Requirements Section 10 (Confidentiality) Related Documents**

* HIPAA Policy
* Billing policies for clients seeking confidential services

**Title X Program Requirements Section 11 (Community Participation, Education, and Project Promotion) Related Documents**

* Most recent Community Advisory Committee meeting minutes
* Community Participation, Education, and Promotion Plan
* Documentation of Community Participation, Education, and Project Promotion activities for the last 12 months

**Title X Program Requirements Section 13 (Additional Administrative Requirements) Related Documents**

* Disaster and emergency management plans
* Emergency event log
* Property acquisitions list (of properties purchased with Title X funds)
* Certificates of Insurance:
	+ Malpractice/professional liability and property
* Bonding for employees
* Documentation of 501(c) status
* Financial records, including time and effort documentation for project staff payroll
* Approved indirect cost negotiation agreement, if in use
* Most recent audited financial statements
* Most recent A-133 Audit and Management letter (if applicable)

**Title X PPN 2014-01 Related Documents**

* Mandated reporting log or other evidence of due diligence in reporting

**General Impressions/Summary**: [*insert* ***paragraph here with general impressions. For example:***

This report details findings and required corrective actions resulting from a comprehensive review of Family Planning, Inc.'s Title X program in March 2019. The results of the site visit demonstrate that Family Planning, Inc. provides excellent clinical services. There were only two compliance findings indicating that all other areas reviewed complied with Title X Program Regulations.]

**Findings and Required Corrective Actions**

|  |  |  |
| --- | --- | --- |
| **Finding and Title X Requirement**  | **Finding** | **Corrective Action Required** |
| EXAMPLE*Finding 1:* *Training for Minors (Family Involvement and Coercion)* | Family Planning Inc. was not able to provide documentation that staff have been trained on Family Involvement and Resisting Sexual Coercion for Minors. | Family Planning Inc. will ensure that all staff working in the family planning project are trained on Family Involvement and Resisting Sexual Coercion for Minors and provide documentation that the trainings have occurred.  |
| EXAMPLE *Finding 2:* *Information and Education Materials Approval* | Family Planning, Inc. does not have an Information and Education Advisory Committee. | Family Planning, Inc. will convene a Committee of five to nine individuals broadly representative of Family Planning Inc.’s population and develop a plan for the Committee to review all family planning information and educational materials distributed by Family Planning, Inc.  |
| Finding 3 |  |  |
| Finding 4 |  |  |
| Finding 5 |  |  |
| Finding 6 |  |  |

Attached to this Report is a [Corrective Action Plan (CAP)](https://www.fpntc.org/resources/title-x-corrective-action-plan-cap-template).[i*nsert* ***subrecipient****]* must complete the “Intervention/Action,” “Responsible Party,” and “Timeline” sections of the CAP for the findings listed above and return it to [i*nsert* ***grantee’s name and contact information***] [*insert* ***number of days, e.g., 30–60 days****]* of receipt of this report.