**Title X Subrecipient Onboarding Overview**

**Purpose:** The purpose of this tool is to help Title X grantees provide their new subrecipient agencies with an overview of the onboarding process.

**How to use:** Insert grantee and subrecipient information where indicated and modify as necessary to provide the subrecipient with an overview of your agency’s unique onboarding process.

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

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

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

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

Subrecipient agencies new to the Title X network must undertake an onboarding process to ensure that they deliver high-quality services and comply with [Title X Statutes, Regulations, and Legislative Mandates](https://opa.hhs.gov/grant-programs/title-x-service-grants/title-x-statutes-regulations-and-legislative-mandates), [Quality Family Planning Recommendations (QFP)](https://www.cdc.gov/reproductivehealth/contraception/qfp.htm), and other guidance.

Both the subrecipient and grantee must be prepared to commit significant time and focus to the onboarding process. Title X funding has the flexibility to cover a variety of expenses such as staff training, quality assurance and quality improvement activities, program promotion and outreach, IT support, salaries and benefits, and other costs that support the delivery of Title X services. This flexibility, along with the positive impact of the services this funding supports, ensures the value of this investment. Throughout the onboarding process, the grantee will support the subrecipient in ongoing improvement and growth while also monitoring to ensure compliance.

The onboarding process occurs in three phases over approximately one year. Grantees and subrecipients can tailor onboarding activities to their unique needs and circumstances.

# **Phase 1**

During the first phase of onboarding, the subrecipient and grantee communicate to establish expectations for the implementation process. They work together to identify staffing and existing resources. With grantee support, the subrecipient receives Title X education and training. The grantee assesses the subrecipient’s Title X-compliance policies, procedures, and clinical protocols to identify which requirements the subrecipient has in place and which they need to implement, and to determine technical assistance needs.

**Phase 2**

During the second phase of onboarding, the subrecipient receives training and technical assistance from the grantee to ensure their electronic health record (EHR) meets Title X-specific documentation and data submission requirements, and to address other needs identified in Phase 1. With grantee support, the subrecipient finalizes policies, procedures, and clinical protocols, and ensures that Information & Education (I&E) materials and Community Participation, Education, and Program Promotion (CPEP) plans are in place and meet requirements. The subrecipient and grantee work collaboratively to ensure that the subrecipient is positioned to provide quality family planning services in compliance with Title X requirements.

# **Phase 3**

During the third and final phase of onboarding, the subrecipient and grantee work to ensure that the subrecipient is set up to comply with Title X requirements and provide quality family planning services. They close out any outstanding items from Phases 1 and 2. The subrecipient will submit data, fiscal reports, and other documents required by the grantee, and the grantee will provide feedback and technical assistance as needed After closing out the outstanding items from the first two phases, the grantee will continue to provide ongoing support and monitoring including guidance for continuous quality improvement, Title X and reproductive health updates, and information on training opportunities. This may occur through newsletters, network-wide meetings and conferences, subrecipient website portals, informal virtual or in-person site visits, and other mechanisms.