# Title X Site Visit Announcement Letter Template

**Purpose:** This Site Visit Announcement Letter Template contains sample language that a Title X grantee can modify to notify a Title X subrecipient of an upcoming site visit.

**How to use:** Insert the Title X grantee’s name and logo, subrecipient information, and other details where indicated and as needed. Send the completed letter, along with the grantee’s site visit monitoring tool and [Requested Documents List](https://rhntc.org/resources/title-x-site-visit-requested-documents-list-template), to the subrecipient approximately two months before the site visit.

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

*[****Subrecipient Contact Name****]*

*[****Subrecipient Contact Title****]*

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

*[****Address****]*

*[****City, State, Zip Code****]*

*[****Date****]*

The purpose of this letter is to prepare your agency for the Title X site visit that will take place **[***insert* ***dates*].**

The objectives of the site visit are to determine the extent to which the family planning project is aligned with *[insert* ***subrecipient***] family planning contract and the Title X Program Expectations, and to identify promising implementation strategies and opportunities for improvement. We view this visit as an opportunity and a learning experience with the goal of strengthening your Title X project.

The site visit team will include:

* *[insert* ***review team members names and role(s)****]*

## Agenda

Please review the attached agenda and **confirm details for each location**. The family planning project manager should plan on joining each day at the selected service site locations to assist with the visit.

The first day will start with an entrance meeting. At this meeting,*[insert* ***grantee contact name****]* will describe the site visit process and introduce the review team. Be prepared to provide a brief (15–30 minute) overview of the *[insert* ***subrecipient****]* Title X family planning project. Aim to have all staff members participating in the review attend the entrance meeting. We will hold abbreviated versions of this meeting at each service site location.

## Overview of Process

Throughout the review, the site visit team will:

1. Interview key personnel and review personnel files
2. Observe clients/staff interaction and clinic flow
3. Review policies and procedures
4. Conduct audits of financial and administrative records
5. Conduct chart audits of medical records

If you are using an electronic health record (EHR), a staff member who is highly skilled in the use of the EHR should be available to assist the clinical reviewers, as they complete their record review.

## Documentation

A list of documents needed for the site visit is attached. To facilitate an efficient review process, certain documents (as indicated on the list) should be sent in advance *[****specify on a flash drive, in a cloud folder, in hard copy, by email, etc.***] to [*insert* ***name,* [*address or email***] by *[insert* ***due date***]. All other documents on the list should be available on-site. Please inform us if you anticipate any limitations to wireless internet access at the review sites.

## Review Tool

A copy of the site visit monitoring tool that will be used by the team is attached. Please have staff review the tool carefully to familiarize themselves with the review criteria.

Please let us know if you have any questions about the process.

Sincerely,

*[****Name****]*

*[****Job Title****]*

*[****Grantee Name****]*