Video Transcript: August 2025 RHNTC Program Review Vignette Video 1 (2)

Angie (00:01): This video is designed to support Title X program staff in preparing for a federal program review. This video was produced by the Reproductive Health National Training Center, RHNTC. The Office of Population Affairs, or OPA, conducts program reviews to ensure grant recipient compliance, provision of high-quality clinical care, and Title X program integrity. This video offers practical strategies to help your team feel confident and ready for your program review. We are delighted that Dr. Monet Ouwinga is here to share a grantee perspective and lessons learned from preparing for a recent Title X federal program review. Dr. O is a Family Medicine Physician and HIV specialist serving the Greenbelt community in Prince George's County. Thank you for joining us, Dr. O, we're so grateful for your insight. Let's start with a big picture question: What is the purpose of the federal Title X program review?

Dr. O (01:09): Thanks for having me, Angie. The purpose of the federal program review is the formal review process conducted by OPA and their contracted federal reviewers to ensure that our agency is compliant with Title X program requirements. The program review also identifies best practices and areas for improvement for Title X, clinically, fiscally, and administrative operations.

Angie (01:39): How far in advance were you notified about your agency's program review?

Dr. O (01:45): Timelines vary from agency to agency. We received approximately five months notice. This gave us ample time to schedule meetings, prepare and upload all the requested and relevant documentations to Connect.gov. Our formal Title X review notification letter, the assessment tool, and the documents list arrive shortly before the review started.

Angie (02:10): Dr. O, what are some important first steps in the planning process?

Dr. O (02:16): Preparing for the Title X program review requires a lot of dedicated planning. Block time on your calendar to prepare for the program review. Build a dedicated team of one or two support staff for the planning process. It’s going to involve tasks such as pulling charts and checking on your procedures and policies. Often, OPA requests visits to three sites, so if that's relevant to your agency, remember to schedule individual planning and calls with each site. Ensure that key staff members, such as the Family Planning Program Director, the Title X Medical Director, Clinic Managers, and fiscal staff are available during the review and planning sessions.

Angie (03:05): What documents do we need to provide in advance of the review?

Dr. O (03:10): You'll want to use the program review materials list OPA provides in advance of the program review. Documents include: your family planning annual report, data for the current and prior year, fiscal reports, contracts with sub recipients, any previous program review reports, and evidence of corrective actions taken, if needed. Work with your planning team to upload all Title X related policies and procedures; for example, adolescent policy or expedited partner therapy, internal chart audits, relevant clinical guidelines, consent forms, workflows and manuals to Connect.gov about one month before the visit. This will allow ample time for the consultants to review them prior to the review and ask you for any additional documentation if needed. There are a lot of documents, the RHNTC Policy and Procedure Checklists can help you keep track of them. Some agencies use OPA Title X Crosswalk to document which program materials support the various expectations.

Angie (04:26): How can we prepare for the clinical chart review?

Dr. O (04:31): The reviewers will provide details on how many and what type of charts they would like to review. The grantee is responsible for selecting and compiling the sample of charts that represent the diverse client profiles and visit types. Our program reviewers reviewed a few male charts as well as positive and negative pregnancy, abnormal pap smears, positive sexually transmitted infections, with special attention to the day the provider received the results, and the time it took to follow up with the client. Telemed visits and adolescent charts, as well. The reviewers were also interested in our referral processes for services we did not offer, such as behavioral health, endocrine, or sterilization services. Our clinical reviewer wanted to know about pre-conception counseling and reviewing medications for women of childbearing age, including herbal remedies. The fiscal team will also need to walk through several charts to follow billing procedures. We provided these type of charts in advance. We had two dedicated staff members, one clinical and one billing, assigned to help the reviewers walk through the charts. Keep in mind how you protect client data in advance of the chart review audit. We did a live electronic health record review, where I sat side-by-side with the reviewer to prevent others from viewing and accessing the EHR. Access to EHR was limited to the duration of the audit session. Only the records selected for the audit were accessible. No identifying information was verbally shared or unnecessarily displayed. We made sure to follow all HIPAA and organizational privacy protocols.

Angie (06:23): Which policies and procedures should we and our subrecipients or service sites review, Dr. O?

Dr. O (06:30): Staff should be familiar with the Title X Handbook and Expectations, as well as your organization's internal policies pertaining to Title X related services, procedures, and daily workflows. It is important to be transparent and ready to explain what you do and why. If your reviewer brings some issues to light, you can feel free to discuss strategies to address them.

Angie (06:54): And finally, what advice do you have for grantees who have upcoming reviews?

Dr. O (06:59): Identify your resources and start by planning early. There are many components to the program review, but remember, it's mostly a time to showcase all the great work you're already doing and to learn from other people who have evaluated many other programs. Take their suggestions as an opportunity for improvement and do share all the stories that illustrate your agency's strengths. These stories humanize the work that we do and showcase your dedication to your clients.

Angie (07:32): Remember, the program review is an opportunity to showcase your amazing work and to help your agency identify areas that could be strengthened. Be prepared, be present, and be proactive in your follow-up, and remember to enjoy the process. Thank you again to Dr. O and others for lending their perspectives and expertise to this video, which has been brought to you by the RHNTC.