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| **REPRODUCTIVE HEALTH FAMILY PLANNING (RHFP) PROGRAM CLINICAL REVIEW** | | | | | | | | |
| **Instructions:** The WI DHS RHFP Nurse Consultant will use this review form to complete the Clinical Review | | | | | | | | |
| Subrecipient | | RHFP Program Reviewer | | | | Date of Review | | |
|  | |  | | | |  | | |
| **REQUIRED DOCUMENTS** | | | | | | | | |
| Subrecipients must have documentation and evidence that support and demonstrate compliance with Title X Program requirements. These documents ensure that what is contained in written policy is being carried out and substantiate that the project is operating in accordance with Title X Program expectations. | | | | | | | | |
| **Documents** | | | | **Result** | **Comments** | | | |
| Chart Audit – a chart audit has been completed for this review. | | | |  |  | | | |
| General Consent Form – a general consent form that:   * informs clients that services are offered on a voluntary basis, may not be a prerequisite to other services, and note any limitations to confidentiality. * notifies clients of any potential for disclosure of their confidential health information to policyholders when the policyholder is someone other than the client. * Verifies that HIPAA forms are provided to clients. | | | |  |  | | | |
| RN Clinical Protocols – current (within the last 365 days) RN Clinical Protocols signed by agency’s medical director. | | | |  |  | | | |
| Collaborative Agreement – as applicable a signed collaborative agreement between Advanced Practice Provider and agency’s medical director. | | | |  |  | | | |
| Referral List – a referral list is available and has been recently reviewed/revised. | | | |  |  | | | |
| **REQUIRED TRAININGS** | | | | | | | | |
| Title X staff must receive appropriate and adequate training. These required trainings support staff in operating in accordance with Title X Program requirements and the Providing Quality Family Planning Services Recommendations of CDC and the U.S. Office of Population Affairs (QFP).  Each staff member working with the Title X program shall have completed the trainings listed below for the current project period and grant year.   * **Annual** – 4/1/202X through 3/31/202X. * **Project Period** – 4/1/2022 through 3/31/2027 | | | | | | | | |
| **Annual Trainings** | | | | **Result** | **Comments** | | | |
| Family Involvement and Coercion | | | |  |  | | | |
| State Reporting Requirements: Mandatory Reporting for Abuse, Rape, Incest, and Human Trafficking | | | |  |  | | | |
| **Project Period Trainings** | | | | **Result** | **Comments** | | | |
| Client-Centered Services | | | |  |  | | | |
| Confidentiality | | | |  |  | | | |
| Non-Discriminatory Services | | | |  |  | | | |
| Personnel Awareness | | | |  |  | | | |
| Personnel Training | | | |  |  | | | |
| Services Not a Prerequisite for Eligibility or Services | | | |  |  | | | |
| Voluntary and Non-Coercive Services | | | |  |  | | | |
| Providing QFP Toolkit (RHNTC) or equivalent | | | |  |  | | | |
|  | | | |  |  | | | |
| **EXPECTATIONS** | | | | | | | | |
| For an expectation to be considered met, subrecipient must: meet all required documentation and training line items listed above **AND** meet all policy, procedure, and site evaluation line items in each listed expectation below. | | | | | | | | |
| **Expectation 1.2:** Ensure that acceptance of services is solely on a voluntary basis and may not be made a prerequisite to eligibility for, or receipt of, any other services, assistance from or participation in any other program of the recipient. | | | | | | | | |
| Written policy and procedure comply with this expectation.  Chart audit demonstrates compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
|  |  | | | | | | | |
| **Expectation 2.1:** Provide services without subjecting individuals to any coercion to accept services or to employ or not to employ any particular methods of family planning. | | | | | | | | |
| Written policy and procedure comply with this expectation.  Current 340B certification.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
|  |  | | | | | | | |
| **Expectation 2.2:** Ensure that acceptance of services is solely on a voluntary basis and may not be made a prerequisite to eligibility for, or receipt of, any other services, assistance from or participation in any other program of the recipient. | | | | | | | | |
| Written policy and procedure comply with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
|  |  | | | | | | | |
| **Expectation 2.3:** Provide services in a manner that is client-centered, culturally, and linguistically appropriate, inclusive, and trauma-informed. | | | | | | | | |
| Written policy and procedure comply with this expectation.  Access to language line or other translation services.  Educational material(s) is approved by an I & E Committee.  Educational material(s) is translated into other languages, as needed.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 2.4:** Provide services in a manner that protects the dignity of the individual. | | | | | | | | |
| Written policy and procedure comply with this expectation.  Access to language line or other translation services.  Educational material(s) is approved by an I & E Committee.  Educational material(s) is translated into other languages, as needed.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
|  |  | | | | | | | |
| **Expectation 2.5:** Provide services in a manner that ensures equitable and quality service delivery consistent with nationally recognized standards of care. | | | | | | | | |
| Written policy and procedure comply with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 2.6:** Provide quality family planning services that are consistent with the Providing Quality Family Planning Services: Recommendations from Centers for Disease Control and Prevention and the U.S. Office of Population Affairs (QFP) and other relevant nationally recognized standards of care. | | | | | | | | |
| Written policy and procedure comply with this expectation.  Chart audit demonstrates compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 2.7:** Advance health equity through the delivery of Title X services. Health equity is when all persons have the opportunity to attain their full health potential, and no one is disadvantaged from achieving this potential because of social position or other socially determined circumstances. | | | | | | | | |
| Written policy and procedure comply with this expectation.  Educational material(s) is approved by an I & E Committee.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 2.8:** Improve and expand accessibility of services for all clients, especially low-income clients by providing client-centered services that are available when and where clients need them and can most effectively access them. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Access to language line or other translation services.  Educational material(s) is approved by an I & E Committee.  Clinic layout allows for client mobility.  Community needs assessment is done periodically to ensure services are meeting client’s needs.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 2.9:** Offer pregnant clients the opportunity to be provided information and counseling regarding each of the following options: prenatal care and delivery; infant care, foster care, or adoption; and pregnancy termination.  If requested to provide such information and counseling, projects must provide neutral, factual information and nondirective counseling on each of the options, and referral upon request, except with respect to any option(s) about which the pregnant client indicates they do not wish to receive such information and counseling. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 2.10:** Provide that family planning medical services will be performed under the direction of a clinical services provider (CSP), with services offered within their scope of practice and allowable under state law, and with special training or experience in family planning. CSPs include physicians, physician assistants, nurse practitioners, certified nurse midwives, and registered nurses with an expanded scope of practice who are trained and permitted by state-specific regulations to perform all aspects of the user (male and female) physical assessments recommended for contraceptive, related preventive health, and basic infertility care. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Clinical Service Provider maintains licensure and credentials.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 2.11:** Ensure that non-clinical counseling services (such as contraceptive counseling, nondirective options counseling, reproductive life planning, etc.) is provided by any adequately trained staff member who is involved in providing family planning services to Title X clients; this may include CSPs and non-CSPs (e.g., health educators). | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 3.1:** Apply all expectations listed under “Provision of Quality Family Planning Services” when providing services to adolescent clients. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 3.2:** Provide adolescent-friendly health services, which are services that are accessible, acceptable, equitable, appropriate, and effective for adolescents. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Clinic schedule has various hours allowing for after school appointments.  Physical layout of the clinic allows for confidentiality and privacy.  Clinic environment is welcoming.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 3.3:** To the extent practical, Title X projects shall encourage family participation. However, Title X projects may not require consent of parents or guardians for the provision of services to minors, nor can any Title X project staff notify a parent or guardian before or after a minor has requested and/or received Title X family planning services. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 3.4:** Ensure that all applicants for Title X funds certify that they encourage family participation in the decision of minors to seek family planning services. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 3.5:** Ensure that all applicants for Title X funds certify that they provide counseling to minors on how to resist attempts to coerce minors into engaging in sexual activities. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 3.6:** No Title X services provider shall be exempt from any State law requiring notification or the reporting of child abuse, child molestation, sexual abuse, rape, or incest. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 4.1:** Provide for medical services related to family planning (including consultation by a clinical services provider, examination, prescription and continuing supervision, laboratory examination, contraceptive supplies), in person or via telehealth, and necessary referral to other medical facilities when medically indicated and provide for the effective usage of contraceptive devices and practices. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 4.2:** Provide for social services related to family planning, including counseling, referral to and from other social and medical service agencies, and any ancillary services which may be necessary to facilitate clinic attendance. | | | | | | | | |
| Written policy and procedure complies with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
|  |  | | | | | | | |
| **Expectation 4.4:** Ensure service sites and subrecipients have strong links to other community providers to ensure that clients have access to primary care. If a client does not have another source of primary care, priority should be given to providing related reproductive health services or providing referrals, as needed. Screening services such as, medical history; cervical cytology; clinical breast examination; mammography; and pelvic and genital examination should be provided for clients without a primary care provider, where applicable, and consistent with nationally recognized standards of care. In addition, appropriate follow-up, if needed, should be provided while linking the client to a primary care provider. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Expectation 10.1:** Develop and implement a quality improvement and quality assurance plan that involves collecting and using data to monitor the delivery of quality family planning services, inform modifications to the provision of services, inform oversight and decision-making regarding the provision of services, and assess patient satisfaction. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Subrecipient has a QI/QA Plan.  Subrecipient has completed annual clinical chart review. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Prohibition of Abortion Expectation 11.5:** A Title X project may not provide pregnancy options counseling which promotes abortion or encourages persons to obtain abortion, although the project may provide patients with complete factual information about all medical options and the accompanying risks and benefits. While a Title X project may provide a referral for abortion, which may include providing a patient with the name, address, telephone number, and other relevant factual information (such as whether the provider accepts Medicaid, charges, etc.) about an abortion provider, the project may not take further affirmative action (such as negotiating a fee reduction, making an appointment, providing transportation) to secure abortion services for the patient. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **Prohibition of Abortion Expectation 11.6:** Where a referral to another provider who might perform an abortion is medically indicated because of the patient's condition or the condition of the fetus (such as where the woman's life would be endangered), such a referral by a Title X project is not prohibited. The limitations on referrals do not apply in cases in which a referral is made for medical indications. | | | | | | | | |
| Written policy and procedure complies with this expectation.  Chart audit demonstrates compliance with this expectation.  Staff interviews/observations indicate compliance with this expectation. | | | | | | | | |
| **Result** | **Comments** | | | | | | | |
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| **SIGNATURE** — Reviewer | | | Name — Reviewer (printed) | | | | Date Signed |
|  | | |  | | | |  |

**FAMILY PLANNING METHODS**

All projects must provide a broad range of acceptable and effective family planning methods. If an agency offers only a single method or a limited number of methods of family planning, it may participate as part of a project as long as the entire project offers a broad range of family planning methods and services (listed below from most to least effective).

|  | **Available In House** | **In Stock** | **Referral Needed** | **Comments** |
| --- | --- | --- | --- | --- |
| Female sterilization |  |  |  |  |
| Male sterilization |  |  |  |  |
| Levonorgestrel intrauterine device (LNG IUD) |  |  |  |  |
| Copper IUD |  |  |  |  |
| Implant |  |  |  |  |
| Injectable |  |  |  |  |
| Combined hormonal pill |  |  |  |  |
| Progestin-only pill |  |  |  |  |
| Emergency contraception pills |  |  |  |  |
| Patch |  |  |  |  |
| Ring |  |  |  |  |
| Diaphragm |  |  |  |  |
| External (male) condom |  |  |  |  |
| Internal (female) condom |  |  |  |  |
| Sponge |  |  |  |  |
| Spermicide |  |  |  |  |
| Fertility awareness-based methods |  |  |  |  |
| Other: |  |  |  |  |