

**NC Department of Health and Human Services,  
Division of Public Health (DPH)**

**Women, Infant and Community Wellness Section (WICWS)  
Reproductive Health Branch (RHB)**

**Family Planning Title X Updated Orientation  
Checklists and Program Training Record Webinar**

**May 12, 2023**

NCDHHS, Division of Public Health, Women, Infant & Community Wellness Section | FP Title X Orientation/Training Checklist Updates

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## **Objectives**

By the end of this webinar participants should be able to:

- Identify and navigate the updated Title X Orientation Checklists
- Identify and navigate the new staff Title X Family Planning Program Training Record
- Understand when to use the Title X Orientation Checklists vs. the new Title X Family Planning Program Training Record
- Understand the use of these updated/new forms does not start until June 1, 2023

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### III. Scope of Work and Deliverables

#### 7. The policies that address family planning services in each Local Health Department shall include:

- f. REQUIRED TRAINING COURSES
- 1) It is the responsibility of the Local Health Director or their designee to have all Title X funded staff and staff who provide services to Title X patients (e.g., management support, lab, social workers, health educators, clinicians/providers/Medical Directors, nurses, and other staff) complete the following federal and state required training:
    - a. **One time, on hire**, Title X-funded staff and staff who provide services to Title X patients are required to complete the [Title X Orientation Checklists](#). The applicable Orientation Checklists must be completed **within 60 days of hire**.
    - 1) The Orientation Checklists can be accessed at the WICWS website under the [Required Title X/Family Planning Trainings section](#).<sup>11</sup>

<sup>11</sup><https://wicws.dph.ncdhhs.gov/provpart/training.htm>

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### III. Scope of Work and Deliverables

#### 7. The policies that address family planning services in each Local Health Department shall include:

- f. REQUIRED TRAINING COURSES
- 2) The [Orientation Checklist](#) is a Microsoft Excel workbook which contains tabbed sheets, and each sheet designates which types of staff must complete that sheet. All new staff must complete the tab labeled "All Staff Orientation." Other tabs are role-specific; new staff must complete the tab that matches their role in working with Title X patients.
  - 3) **Originals of initial orientation documents** (i.e., All Staff Title X Orientation Checklist and Role-specific Checklists) must be on file in the employee's personnel file and retained in accordance with 2021 General Records Schedule, Standard 4, Items 4.28 and 4.41.<sup>12</sup> Copies must be readily accessible and available for review by the WICWS Regional Nurse Consultant during monitoring.

<sup>12</sup> <https://archives.ncdcr.gov/media/1066/open>

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### III. Scope of Work and Deliverables

#### 7. The policies that address family planning services in each Local Health Department shall include:

- f. REQUIRED TRAINING COURSES
- a. All Title X-funded staff and staff who provide services to Title X patients are required to complete the trainings indicated on the [Title X Family Planning Program Training Record<sup>13</sup>](#) under the *Required Title X/Family Planning Trainings* section by [May 31, 2024](#). This Record must be signed by the Family Planning Medical Director and submitted no later than [June 30, 2024](#), to Kristen Carroll, Reproductive Health Branch Head, at [kristen.carroll@dhhs.nc.gov](mailto:kristen.carroll@dhhs.nc.gov).
  - b. Even if the Local Health Director position is not Title X-funded, DPH recommends the above training courses for the Local Health Director.

<sup>13</sup> <https://wicws.dph.ncdhhs.gov/provpart/training.htm>

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### Tracking of Title X Orientation & Training

#### *The Family Planning Staff Title X Orientation and Annual Training Checklists*

**is now the...**

#### **Family Planning/Title X Staff Orientation Checklists**

- Title X-funded staff and staff who provide services to Title X patients are required to complete the Title X Orientation Checklists.
- The checklist is now used only for orientation.
- The checklist must be completed within 60 days of hire or change in position within the agency.
- Originals of initial orientation documents must be on-site in the employee's personnel file.

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### Family Planning/Title X Staff Orientation Checklists

A required documentation tool for any Title X-funded staff and other staff who provide services to Title X patients.

**Employee Name:** \_\_\_\_\_  
**Position Title:** \_\_\_\_\_  
**Hire Date:** \_\_\_\_\_

**Checklists Contained (as individual tabs/worksheets within this workbook)**  
 ✓ All Title X Staff Orientation (within 60 days of hire)  
 ✓ Nursing (including Nurse Supervisors and Directors of Nursing) Orientation (within 60 days of hire)  
 ✓ Medical Office Assistants or Nursing Assistants/Interpreters/Laboratory Staff Orientation (within 60 days of hire)  
 ✓ Registration/Eligibility/Billing Staff Orientation (within 60 days of hire)  
 ✓ Provider Orientation (within 60 days of hire)

**Assessment/Orientation Method Key:**  
 O = Observation  
 RD = Return Demonstration  
 V = Verbal Review  
 RA = Record Audit  
 IS = In-Service Staff Training  
 W = Webinar or other Computer-based Staff Training

**Assessment Rating Key:**  
 S = Satisfactory  
 I = Needs Improvement  
 NA = Not Applicable (Use rating when the skill/knowledge is not required of the staff)  
 C = Completed

**Instructions:** This tool is intended to assist agencies in documenting the orientation of any Title X-funded staff and other staff who provide services to Title X patients. A combination of the checklists in this tool will be required for staff working in Title X clinics whethe they provide direct clinical services or serve in other administrative or financial roles.  
 \* The tab labeled "All Staff Orientation" should be completed by any Title X-funded staff and other staff who provide services to Title X patients.  
 \* Staff should complete the appropriate orientation **within 60 days of hire.**  
 \* **Items in RED are new/updated language.**  
 \* The person completing the assessment is the supervisor or designated staff who verifies the employee's understanding or competence for all requirements.  
 \* The Orientation checklists, once completed, should be kept on file in the employee's personnel record. Copies of the these documents should be maintained at the agency in an easily accessible place.

RHB (Revised 6/2023) RHB (Review 6/2025)

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Checklist Description | 
 All Staff Orientation | 
 Nursing Orientation | 
 MOA NA Interpreter Lab | 
 RegistrationEligibilityBilling

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All Staff Title X Orientation Checklist					
2	Name of Employee:	Assessment Date	Assessment Method	Assessment Rating	Name/Title of Person Completing Assessment
3	Knowledge/Skills Assessed ↓				
4	Comments:				
5	<b>Demonstrates the essential knowledge and skills required to perform competently in the Title X Family Planning Program setting</b>				
6	1. Verbalizes understanding that services are provided regardless of clients' residency/immigration status, and the client does not have to be referred by a physician for services.				
7	2. Verbalizes understanding that Title X Services are voluntary and clients may not be coerced to choose any particular contraceptive method or service, including abortion or sterilization. Demonstrates obtaining voluntary consent for services.				
8	3. Verbalizes understanding that under Title X, abortion is not to be offered as a method of family planning.				
9	4. Verbalizes understanding that a client's acceptance of a family planning service is not a prerequisite to eligibility for any other service offered by the agency.				
10	5. Verbalizes understanding of Title X confidentiality and privacy requirements, particularly with regard to "no contact" and minor patients.				
11	6. Verbalizes understanding of the Title X non-discrimination requirements. Services must be provided without regard to sex, sexual orientation, gender identity, sex characteristics, age, disability, race, color, national origin, religion, marital status, and number of pregnancies.				
12	7. Verbalizes understanding of the priority population for Family Planning services.				
13	8. Verbalizes understanding that a person's inability to pay must not be a barrier to the receipt of services.				
14	9. Verbalizes understanding of availability of community services, and demonstrates ability to share this information with clients as appropriate.				
15	10. Demonstrates how to access Language Translation and Interpreter Services for individuals with Limited English Proficiency and verbalizes understanding of policies and procedures related to accessing language translation services.				
16	11. Demonstrates cultural awareness and sensitivity to individual differences, including sexual orientation/preference, during encounters with Family Planning clients.				
17	12. Verbalizes understanding that all patient and consumer information is confidential.				

Checklist Description | 
 All Staff Orientation | 
 Nursing Orientation | 
 MOA NA Interpreter Lab | 
 RegistrationEligibilityBilling | 
 Provider Orientation

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All Staff Title X Orientation Checklist				
Name of Employee:				
Knowledge/Skills Assessed ↓	Assessment Date	Assessment Method	Assessment Rating	Name/Title of Person Completing Assessment
<b>Demonstrates the essential knowledge and skills required to perform competently in the Title X Family Planning Program setting</b>				
Comments:				
1. Verbalizes understanding that services are provided regardless of clients' residency/immigration status, and the client does not have to be referred by a physician for services.				
2. Verbalizes understanding that Title X Services are voluntary and clients may not be coerced to choose any particular contraceptive method or service, including abortion or sterilization. Demonstrates obtaining voluntary consent for services.				
3. Verbalizes understanding that under Title X, abortion is not to be offered as a method of family planning.				
4. Verbalizes understanding that a client's acceptance of a family planning service is not a prerequisite to eligibility for any other service				
5. Verbalizes understanding of Title X confidentiality and privacy requirements, particularly with regard to "no contact" and minor patients.				
6. Verbalizes understanding of the Title X non-discrimination requirements. Services must be provided without regard to sex, sexual orientation, gender identity, sex characteristics, age, disability, race, color, national origin, religion, marital status, and number of pregnancies.				
7. Verbalizes understanding of the priority population for Family Planning services.				
8. Verbalizes understanding that a person's inability to pay must not be a barrier to the receipt of				
9. Verbalizes understanding of availability of community services, and demonstrates ability to				

Checklist Description All Staff Orientation Nursing Orientation MOA NA Interpreter Lab RegistrationEligibilityBilling Provider

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Family Planning Registration/Eligibility/Billing Staff Orientation Checklist				
Name of Employee:				
Knowledge/Skills Assessed ↓	Assessment Date	Assessment Method	Assessment Rating	Name/Title of Person Completing Assessment
<b>Demonstrates the essential knowledge and skills required to fulfill Registration/Eligibility/Billing staff responsibilities in the Title X Family Planning Program setting</b>				
Comments:				
1. Review of the local Family Planning Program Administration and Financial sections and other relevant agency policies/procedures/protocols completed.				
2. Demonstrates understanding of the charges, billing, and collection policies/procedures/protocols.				
3. Verbalizes understanding of the role of Registration/Eligibility/Billing staff within the Family Planning Clinic.				
4. Verbalizes understanding that clients at or below 100% of Federal Poverty Level are not charged for Title X Family Planning services.				
5. Verbalizes understanding that the agency has a process for determining the reasonable cost of providing services (the Financial policy/procedure/protocol should reflect this).				
6. Verbalizes understanding that cost must never be a barrier to the receipt of services.				
7. Verbalizes understanding that clients are not denied services because of inability to pay and that the quality of care received is also unaffected by a client's ability to pay.				

Checklist Description All Staff Orientation Nursing Orientation MOA NA Interpreter Lab RegistrationEligibilityBilling Provider Orientation

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## Tracking of Title X Orientation & Training




### Title X Family Planning Program Training Record

- The training record will be used for [annual training](#) for all staff on the same sheet for ease of tracking.
- A new spreadsheet will be made available with each new Agreement Addendum (AA) to alert you to which trainings are required each year.
- Trainings must be completed & documented by **May 31<sup>st</sup> each year.**
- The training record must be **reviewed & signed** by your Family Planning Medical Director.
- The training record must be submitted to the Reproductive Health Branch (RHB) by **June 30<sup>th</sup> of each year.**

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		<b>Title X Family Planning Program Training Record</b>												
		<b>COMPLETION DATE:</b> May 31, 2024 (Year 1 Grant) - Trainings must occur between 6/1/2023 - 5/31/2024												
		<small>Title X projects are required to keep a record of staff training on the Title X program expectations. <b>Yellow &amp; green</b> are expected for all staff to complete. Trainings in <b>blue</b> are required for clinical staff (APPs, RNs, LPNs). Record the name of the Title X staff person, their role, whether clinical or not, and the date this person completed all relevant trainings. This record must be signed (electronic signature is acceptable) by the FP Medical Director and <b>submitted no later than June 30, 2024</b> to Kristen Carroll, Reproductive Branch Head, at <a href="mailto:Kristen.Carroll@dhhs.nc.gov">Kristen.Carroll@dhhs.nc.gov</a>.</small>												
		<b>Medical Director Sign &amp; Date:</b> _____												
Name	Role	Clinical Y/N	All Staff Complete By: 5/31/2024		All Staff Complete By: 5/31/2024				Clinical Staff (APPs, RNs LPNs) Complete By: 5/31/2024					
			Title X Orientation	Cultural Competency	State & Federal Reporting Requirements		Family Involvement and Sexual Coercion		Putting the QP into Practice Series Toolkit					
			(fulfills equity training requirement FY 24)	7/27/23 MR Refresher Webinar	Mandatory Reporting: State & Federal Slides	Mandatory Reporting: Handout	IPV Handout	Trauma Informed Care	Human Trafficking	Family Participation	Sexual Coercion	Introduction to the QP	Reproductive Anatomy and Physiology	Pregnancy Testing and Counseling
Joan Collins	RN	Y	6/5/23	6/5/23	8/15/23	10/2/23	10/2/23	10/2/23	10/2/23	10/2/23	10/2/23	9/15/23	9/15/23	9/15/23
Kim Brown	Billing Manager	N	6/5/23	6/5/23	7/28/23	7/28/23	7/28/23	9/15/23	9/15/23					
Jim Hardy	Health Educator	N	10/1/23	10/1/23	10/1/23	10/1/23	1/9/24	1/9/24	1/9/24					
Mary Lincoln	FNP	Y	6/5/23	6/5/23	8/15/23	10/2/23	10/9/23	10/2/23	10/2/23	10/2/23	10/2/23	9/15/23	9/15/23	9/15/23

## Tracking of Title X Orientation & Training


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 The RHNTC is your go-to source for family planning and adolescent health training and technical assistance. [Learn more](#)





Reproductive Health National Training Center (RHNTC) <https://rhntc.org/>

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## My Training Account

Profile Details
Saved & Recommended Resources
My Active Courses
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Help

**Name\***

First  Last

**Agency Name\***

**Email address\***

**Username\***

**Password\***

Password strength:

**Confirm password\***

Passwords match:

**ZIP Code**

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All RHNTC eLearning trainings completed by your profile will automatically appear here after you finish the post-course evaluation. Click on the "Add Training" button to manually add trainings taken separately.

[Add Training](#) [Create Training Report](#)

Training Name	Training Source	Date Completed	Certificate Download
Human Trafficking in The Family Planning Setting Webinar	RHNTC	2019-05-29	<a href="#">Completion</a>
Pregnancy Testing and Counseling eLearning	RHNTC	2019-05-29	<a href="#">Completion</a> <a href="#">CE Credit</a>
Putting the QFP into Practice Series: Integrating Reproductive Life Planning into Your Family Planning Session Webinar	RHNTC	2019-10-30	<a href="#">Completion</a>
Counseling Adolescent Clients to Encourage Family Participation Video	RHNTC	2020-01-02	<a href="#">Completion</a>
Providing Trauma-Informed Care in Family Planning Clinics Webinar	RHNTC	2020-06-02	<a href="#">Completion</a> <a href="#">CE Credit</a>
Counseling Adolescent Clients to Resist Sexual Coercion Video	RHNTC	2020-06-26	<a href="#">Completion</a>
Obesity, Insulin Resistance, and Prediabetes: Supporting Adolescents and Young Adults (Part 1) Webinar	RHNTC	2021-06-04	<a href="#">Completion</a> <a href="#">CE Credit</a>
Introduction to Reproductive Anatomy and Physiology eLearning	RHNTC	2021-06-04	<a href="#">Completion</a> <a href="#">CE Credit</a>
What's New with Coding? Updates for Title X Family Planning Agencies Webinar	RHNTC	2021-08-05	<a href="#">Completion</a>

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Let's take a few minutes to walk through the new and updated tracking sheets

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