




**NC Department of Health and Human Services**  
**Division of Public Health**  
**Women’s Health Branch**  
  
**Family Planning Agreement Addendum**  
**Webinar**  
**Fiscal Year 2021-2022**  
  
**March 2021**

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### III. Scope of Work and Deliverables

**F. In order to meet the Deliverables listed in this section through the delivery of family planning services, the health department shall:**

**2. Utilize these resources for services:**

- **a. Program Requirements for Title X**  
<https://www.federalregister.gov/documents/2019/03/04/2019-03461/compliance-with-statutory-program-integrity-requirements>

In order to view the Title X requirements, you can either access the Federal Register language utilizing the link in the Agreement Addendum (AA), or the Family Planning Review Tool now serves as the Review Tool & the Program Requirements document. The current document is on the Women’s Health Branch website, under the 2020-2021 AA materials:  
<https://whb.ncpublichealth.com/provpart/agreement-addenda.htm>

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### III. Scope of Work and Deliverables

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

##### 1. CLINICAL SERVICES

- g. All patients must be assessed for a primary care provider as part of their health history. If a patient does not have a primary care provider, a referral should be offered and documented in the medical record.**

**Review from 2020:** All Family Planning clients must be assessed to determine if they have a primary care provider and referred if they do not have one. This must be documented in the client record. Also, a reminder that unless the Local Health Department operates a clinic that offers primary care services to the entire community, including Family Planning patients, a Memoranda of Understanding (MOU) with another agency that can provide primary care services for Local Health Department Family Planning patients is required. A current copy of this MOU must be submitted to the Women's Health Branch annually with this Agreement Addendum (Letter E in the Scope of Work)

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### III. Scope of Work and Deliverables

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

##### 6b. REQUIRED TRAINING COURSES

- 4. Originals of initial orientation documents [i.e., All Staff Title X Orientation Checklist, Role-specific Checklists and Clinical Staff One-Time Training Checklist] must be on file in the employee's personnel file and retained in accordance with the 2019 Local Government Agencies General Records Retention and Disposition Schedule, Standard 6, Items 42 and 29.**

**UPDATE:** Information was added about retaining files per the NC Department of Health and Human Services Retention Schedule to provide clarification for local health departments when questions arise regarding how long to maintain training records.

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### III. Scope of Work and Deliverables

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

**6b. REQUIRED TRAINING COURSES**

- 5. Original records of annual training [i.e., Clinical Staff Annual Training Checklist, All Staff Annual Training Checklist, and All Staff Annual Confirmation of Understanding Checklist] must be kept internally until the Office of the Controller provides written guidance that records are released from all audits and other official actions, and then destroyed in accordance with that guidance, per the 2019 Local Government Agencies General Records Retention and Disposition Schedule, Standard 1, Item.**

**UPDATE:** The NC Department of Health and Human Services Retention Schedule is in the process of being updated so please be aware that the section and item numbers may change once the updates are complete.  
<https://archives.ncdcr.gov/government/retention-schedules/local-government-schedules/local-health-departments-schedule>

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### III. Scope of Work and Deliverables

**6. Required Trainings**

- c. Curriculum vitae of the Medical Directors must indicate special training or experience in family planning if the Medical Directors are not board-certified OBGYNs (obstetrician-gynecologists). Medical Directors who are not board-certified OBGYNs should participate in training or continuing education related to Family Planning on an annual basis and should maintain documentation of their participation. A list of possible trainings or continuing education opportunities can be accessed at**

<https://whb.ncpublichealth.com/provpart/training.htm>

**Review from 2020:** Added language for Medical Directors so that they will have access to the same information for training opportunities available on the Women's Health Branch website to meet the education requirements for family planning

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**III. Scope of Work and Deliverables**

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

**7. REQUIRED SIGNAGE IN CLINIC AREA**

**e. All signs, posters, videos, brochures, and other client education materials noting the client’s right to confidential services are freely available to clients. This requirement is related to the receipt of Title X confidential services in addition to standard Health Insurance Portability and Accountability Act (HIPAA) confidentiality.**

**UPDATE:** Additional language added to clarify that the signage requirements regarding confidentiality are stricter than HIPAA, but they are significant because they are part of Title X requirements.

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**III. Scope of Work and Deliverables**

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

**8. CHLAMYDIA AND GONORRHEA SCREENING**

**c. Should the Local Health Department experience a shortage of Chlamydia and Gonorrhea test kits due to COVID-19, the Local Health Department is required to follow the most current Centers for Disease Control and Prevention (CDC)/North Carolina guidelines for testing.**

**NEW:** Additional language added due to the current shortage of testing kits because of increased demand for the kits to test for COVID 19. In the event the shortage of kits continues, this guidance allows local health departments to follow the most current CDC guidance, as needed, for testing.

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### III. Scope of Work and Deliverables

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

##### 10b. ENHANCED ROLE NURSE (ERN) REQUIREMENTS

The completion of 100 clinical hours and 10 educational contact hours during the fiscal year, July 1, 2021–June 30, 2022, shall be documented by the Local Health Department. The documentation for the prior state fiscal year (July 1, 2020–June 30, 2021) must be submitted by August 16, 2021 to the Women's Health Branch (WHB), through completion of the WHB ERN Survey Monkey Survey. A link to the survey will be sent via email to the ERN as well as the agency's Director of Nursing. *(continued on next slide)*

**UPDATE:** Added language that any Enhanced Role Nurses (ERN) re-rostering must submit a competency checklist completed by the agency's Medical Director/Consultant responsible for Family Planning. This change was communicated to the ERNs/Nurse Supervisors in 2020. Adding in Agreement Addendum to match guidance sent out and consistent with other ERN programs.

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### III. Scope of Work and Deliverables

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

##### 10b. ENHANCED ROLE NURSE (ERN) REQUIREMENTS *(continued)*

The Local Health Department shall advise their Women's Health Branch Regional Nurse Consultant of any ERNs who have either retired or are no longer functioning as an ERN and they will be removed from the current roster and will not be required to complete the survey.

**Additionally, any ERN who is seeking re-rostering must submit a competency checklist completed by the agency's Medical Director/Medical Consultant responsible for the Family Planning Program.**

**UPDATE:** Added language that any Enhanced Role Nurses (ERN) re-rostering must submit a competency checklist completed by the agency's Medical Director/Consultant responsible for Family Planning. This change was communicated to the ERNs/Nurse Supervisors in 2020. Adding in Agreement Addendum to match guidance sent out and consistent with other ERN programs.

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## IV. Performance Measures/Reporting Requirements

### B. Annual Reports

- 5. To ensure that all local program income that is supporting the Family Planning Program is reported, quarterly reports must be submitted through an online survey according to the following schedule:

Reporting Interval	Report Due Date
April 1–June 30, 2021	July 30, 2021
July 1–September 30, 2021	October 29, 2021
October 1–December 31, 2021	January 31, 2022
January 1–March 31, 2022	April 29, 2022

A survey will be emailed each quarter by the Women’s Health Branch to the Local Health Department for it to be completed.

**UPDATE:** The dates that reports are due was reformatted, but the information has not changed. Reports are due quarterly.

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## IV. Performance Measures/Reporting Requirements

### B. Annual Reports

- 7. The Local Health Department shall complete an annual Community Engagement Plan and an annual Community Education/Service Promotion Plan.

A sample template is located at:

<https://whb.ncpublichealth.com/provPart/forms.htm>.

**The plans must be submitted to the Family Planning Program Consultant electronically by August 2, 2021**

**Review:** This requirement is not new, but the update is that now the Community Engagement Plan and the Community Education Plan must be submitted to the Women’s Health Branch annually .

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## Attachment A Detailed Budget Instructions and Information

### Travel

*This was the correct rate at the time the Agreement Addenda were finalized*

**Current Mileage Rates – For informational purposes, the Office of State Budget and Management (OSBM) lists the standard mileage rate set by the Internal Revenue Service as \$0.575 per mile, effective January 1, 2020.**

**Effective January 1, 2021 the OSBM updated the mileage rate to \$0.56 per mile. This is the rate to use when submitting your budget.**

**UPDATE:** This is updated annually so as of January 1, 2021 the new rate is \$0.56 per mile.

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## Attachment C Family Planning Clinical and Educational Services

### Labs

**5. Hepatitis C screening I (Agency may refer to another agency for testing if warranted by screening)**

**(United States Preventive Services Taskforce (USPSTF) recommendation, Grade B) to screen persons at high risk for infection for hepatitis C, and one-time screening for hepatitis C virus (HCV) infection for all persons 18-79 years of age**

**NEW:** In March 2020 USPSTF made this change and the Centers for Disease Control and Prevention (CDC) followed in April 2020. The previous screening cohort was person born between 1945-1965.

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## Highlighted Women's Health Branch (WHB) Website Pages

- **WHB Website Home Page - bookmark it!**  
<https://whb.ncpublichealth.com/index.htm>
- **Resources page**
  - WHB URL > Providers and Partners > Resources
- **Training page**
  - Providers and Partners > Training > Required Title X/FP Trainings > FP Non-Required Trainings > Women's Health Non-Required Trainings

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## Contacts for Questions

- **Data questions: Marissa Peters**  
 – [marissa.peters@dhhs.nc.gov](mailto:marissa.peters@dhhs.nc.gov)
- **Budget questions: Joseph Scott**  
 – [joseph.scott@dhhs.nc.gov](mailto:joseph.scott@dhhs.nc.gov)
- **Clinical, training and other questions:**
  - The Women's Health Regional Nurse Consultant assigned to your health department  
<https://whb.ncpublichealth.com/docs/RNC-Map.pdf>

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## Complete Short Online Evaluation Survey to Download Certificate of Attendance

### Beginning March 24, 2021:

- this pre-recorded webinar, slides & handouts will be archived at <http://whb.ncpublichealth.com/provPart/training.htm>, see *WH Non-Required Trainings* heading.
- **complete the short online evaluation survey at <https://www.surveymonkey.com/r/27LKYB3> to download a Certificate of Attendance.**

There is no continuing education credit available.