Medicare Part C and Part D Reporting Requirements
Data Validation Procedure Manual

Appendix G: Example Site Visit Agenda

**Sponsoring Organization Name - Contract Number(s)**
**Address of Site Visit**

**Dates of Site Visit**

**SITE VISIT AGENDA– DAY 1**

| Topic | Attendees | Location | Time |
|---|---|---|---|
| **Entrance Conference**<br>• Introductions<br>• Administrative Needs<br>• Purpose/ Objectives of Data Validation Review<br>• Overview of Agenda | **Sponsoring Organization:**<br>All Management and Report/Data Owners Invited<br>**Reviewer:**<br>All Review Team Members | | [1/2 hour] |
| Staff Interviews, Demonstrations, and Data Extraction/Sampling Process | | | |
| • Reporting Section 1 | **Sponsoring Organization:**<br>• Report owner<br>• Data provider<br>**Reviewer:**<br>• Applicable team member(s) | | [Allow sufficient time for the sponsoring organization to provide an overview of each of the relevant data systems used in gathering data and producing reports and to complete the data extraction/sampling process; will vary by reporting section; multiple sessions could be conducted concurrently at the discretion of the review team] |
| • Reporting Section 2 | **Sponsoring Organization:**<br>• Report owner<br>• Data provider<br>**Reviewer:**<br>• Applicable team member(s) | | |
| • Reporting Section 3 | **Sponsoring Organization:**<br>• Report owner<br>• Data provider<br>**Reviewer:**<br>• Applicable team member(s) | | |
| **End of Day One Conference** | **Sponsoring Organization:**<br>All Management and Report/Data Owners Invited<br>**Reviewer:**<br>All Review Team Members | | [1/2 hour] |

## SITE VISIT AGENDA – DAY 2

| Topic | Attendees | Location | Time |
|---|---|---|---|
| **Day Two Entrance Conference**<br>• Administrative Needs<br>• Overview of Day 2 Agenda | **Sponsoring Organization:**<br>All Management and Report/Data Owners Invited<br>**Reviewer:**<br>All Review Team Members | | [1/2 hour] |
| **Staff Interviews, Demonstrations, and Data Extraction/Sampling Process** | | | |
| • Reporting Section 4 | **Sponsoring Organization:**<br>• Report owner<br>• Data provider<br>**Reviewer:**<br>• Applicable team member(s) | | [Allow sufficient time for the sponsoring organization to provide an overview of each of the relevant data systems used in gathering data and producing reports and to complete the data extraction/sampling process; will vary by reporting section; multiple sessions could be conducted concurrently at the discretion of the review team] |
| • Reporting Section 5 | **Sponsoring Organization:**<br>• Report owner<br>• Data provider<br>**Reviewer:**<br>• Applicable team member(s) | | |
| • Reporting Section 6 | **Sponsoring Organization:**<br>• Report owner<br>• Data provider<br>**Reviewer:**<br>• Applicable team member(s) | | |
| **End of Day Two Conference** | **Sponsoring Organization:**<br>All Management and Report/Data Owners Invited<br>**Reviewer:**<br>All Review Team Members | | [1/2 hour] |

[continue additional days as needed until all reporting sections have been completed]

| Topic | Attendees | Location | Time |
|---|---|---|---|
| **Exit Conference**<br>• Administrative Needs<br>• Next Steps and Items for Follow-Up<br>• Confirm Points of Contact | **Sponsoring Organization:**<br>All Management and Report/Data Owners Invited<br>**Reviewer:**<br>All Review Team Members | | [1/2 hour] |