Title: Initial Visit  
Policy Number: 2.3

Approved by: Joe Holliday MD, MPH  
Program Area: Family Planning

Effective date: 1976  
Revised date: 9/10/09

Purpose statement of policy:

To provide high quality clinical care that is based upon current, science-based evidence for all individuals seeking family planning services in North Carolina. These services must be consistent with the Title X guidance (Sections 7.2 and 8.3) as well as guidance in the Agreement Addendum from the Family Planning and Reproductive Health Unit of the North Carolina Division of Public Health. Where nationally recognized standards of care conflict with the recommendations set out in the Title X Program Guidelines (2001), Title X providers should provide care that is consistent with current nationally recognized standards and their policies should include a reference to the specific nationally recognized standard(s) of care, recommendation(s), and/or practice standards, as well as including a date of such revision to this policy (OPA Program Instruction Series, OPA 09-01).

Definitions:

Defined within the initial visit policy the following areas must be addressed:

- Education of relevant information and provision of educational material, based upon client needs and knowledge.
- Counseling through an interactive process in which a client is assisted in making an informed choice.
- Explanation of all procedures and obtaining a general consent covering examination and treatment and, where applicable, a method specific informed consent.
- Obtaining of a personal and family medical history and social history.
- Performance of a physical examination and any necessary clinical procedures as indicated by history, method, previous lab tests, and /or American College of Obstetricians and Gynecologists (ACOG), American Cancer Society (ACS), United States Preventive Services Task Force (USPSTF) or other nationally recognized standards of care.
- Performance of routine and other indicated laboratory tests as indicated by history, physical, method, previous lab tests, and /or ACOG, ACS, USPSTF or other nationally recognized standards of care.
- Planned mechanism for client follow-up.
- Provision of medications and/or supplies as needed.
- Provision of referrals as needed for those services that are beyond the scope of this program.

NC Women’s Health Branch  
Family Planning Policy Manual/Initial Examination  
September, 2009  
Page 1 of 2
Responsibilities:

It is the responsibility of the local health department and its designated personnel to develop, implement, and ensure compliance among all staff in the Family Planning Program on the administration of the initial visit policy that assures high quality, evidenced based care for the provision of family planning and preventative health screenings and education.

Policy:

The local health department will ensure that a written policy is in place for the administration of initial visits that address the above required areas in the definition section for all clients seeking services in the Title X Family Planning Clinics.

Legal Authority:

This policy is based on Title X regulations (January, 2001) Sections 7.2 and 8.3 concerning services required in the initial visit for the family planning services and OPA program instruction series, OPA 09-01. It is also based on requirements found in the Division of Public Health Family Planning Agreement Addendum.

References:

Title X guidelines can be accessed at: https://www.grantsolutions.gov/gs/servlet/document.DownloadPdfPublicServlet?document_id=7157

Office of Population Affairs Program Instruction Series can be accessed at: http://www.hhs.gov/opa/familyplanning/toolsdocs/xinstruction.html

Current Family Planning Agreement Addendum can be accessed at: http://whb.ncpublichealth.com/

USPSTF guidelines can be accessed at: http://www.ahrq.gov/clinic/pocketgd.htm

For example policies from the local level, please contact your Regional Women’s Health Nurse Consultant