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

**Appendix G: Example Site Visit Agenda for On-site
or Virtual Visits**

Sponsoring Organization Name - Contract Number(s)
Address of Site Visit, if On-site

Dates of Site Visit

SITE VISIT AGENDA– DAY 1

Topic	Attendees	Location	Time
Entrance Conference • Introductions • Administrative Needs • Purpose/ Objectives of Data Validation Review • Overview of Agenda	**Sponsoring Organization:** All Management and Report/Data Owners Invited **Reviewer:** All Review Team Members		[1/2 hour]
Staff Interviews, Demonstrations, and Data Extraction/Sampling Process	**No data**		[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 1	**Sponsoring Organization:** • Report owner • Data provider **Reviewer:** • Applicable team member(s)		
• Reporting Section 2	**Sponsoring Organization:** • Report owner • Data provider **Reviewer:** • Applicable team member(s)		
• Reporting Section 3	**Sponsoring Organization:** • Report owner • Data provider **Reviewer:** • Applicable team member(s)		
End of Day One Conference	**Sponsoring Organization:** All Management and Report/Data Owners Invited **Reviewer:** All Review Team Members		[1/2 hour]

SITE VISIT AGENDA – DAY 2

Topic	Attendees	Location	Time
Day Two Entrance Conference • Administrative Needs • Overview of Day 2 Agenda	**Sponsoring Organization:** All Management and Report/Data Owners Invited **Reviewer:** All Review Team Members		[1/2 hour]
Staff Interviews, Demonstrations, and Data Extraction/Sampling Process			[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 4	**Sponsoring Organization:** • Report owner • Data provider **Reviewer:** • Applicable team member(s)		
• Reporting Section 5	**Sponsoring Organization:** • Report owner • Data provider **Reviewer:** • Applicable team member(s)		
• Reporting Section 6	**Sponsoring Organization:** • Report owner • Data provider **Reviewer:** • Applicable team member(s)		
End of Day Two Conference	**Sponsoring Organization:** All Management and Report/Data Owners Invited **Reviewer:** 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 • Administrative Needs • Next Steps and Items for Follow-Up • Confirm Points of Contact	**Sponsoring Organization:** All Management and Report/Data Owners Invited **Reviewer:** All Review Team Members		[1/2 hour]