

Medicare Part C and Part D Reporting
Requirements Data Validation Procedure Manual
Appendix G: Example Site Visit Agenda for On-Site or Virtual Visits

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Last Updated: June 2025

Sponsoring Organization (SO) 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 <ul style="list-style-type: none"> • Introductions • Administrative Needs • Purpose/Objectives of Data Validation Review • Overview of Agenda 	SO: <ul style="list-style-type: none"> • All Management and Report/Data Owners Invited Data Validation Contractor (DVC): <ul style="list-style-type: none"> • All Review Team Members 		[1/2 hour]
Staff Interviews, Demonstrations, and Data Extraction/Sampling Process			[Allow sufficient time for the SO 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]
<ul style="list-style-type: none"> • Reporting Section 1 	SO: <ul style="list-style-type: none"> • Report owner • Data provider DVC: <ul style="list-style-type: none"> • Applicable team member(s) 		
<ul style="list-style-type: none"> • Reporting Section 2 	SO: <ul style="list-style-type: none"> • Report owner • Data provider DVC: <ul style="list-style-type: none"> • Applicable team member(s) 		
<ul style="list-style-type: none"> • Reporting Section 3 	SO: <ul style="list-style-type: none"> • Report owner • Data provider DVC: <ul style="list-style-type: none"> • Applicable team member(s) 		
End of Day One Conference	SO: <ul style="list-style-type: none"> • All Management and Report/Data Owners Invited DVC: <ul style="list-style-type: none"> • All Review Team Members 		[1/2 hour]

SITE VISIT AGENDA – DAY 2

Topic	Attendees	Location	Time
Day Two Entrance Conference <ul style="list-style-type: none"> Administrative Needs Overview of Day 2 Agenda 	SO: <ul style="list-style-type: none"> All Management and Report/Data Owners Invited DVC: <ul style="list-style-type: none"> All Review Team Members 		[1/2 hour]
Staff Interviews, Demonstrations, and Data Extraction/Sampling Process			[Allow sufficient time for the SO 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]
<ul style="list-style-type: none"> Reporting Section 4 	SO: <ul style="list-style-type: none"> Report owner Data provider DVC: <ul style="list-style-type: none"> Applicable team member(s) 		
<ul style="list-style-type: none"> Reporting Section 5 	SO: <ul style="list-style-type: none"> Report owner Data provider DVC: <ul style="list-style-type: none"> Applicable team member(s) 		
<ul style="list-style-type: none"> Reporting Section 6 	SO: <ul style="list-style-type: none"> Report owner Data provider DVC: <ul style="list-style-type: none"> Applicable team member(s) 		
End of Day Two Conference	SO: <ul style="list-style-type: none"> All Management and Report/Data Owners Invited DVC: <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> Administrative Needs Next Steps and Items for Follow-Up Confirm Points of Contact 	SO: <ul style="list-style-type: none"> All Management and Report/Data Owners Invited DVC: <ul style="list-style-type: none"> All Review Team Members 		[1/2 hour]