



CMS COR

The CMS COR is the Centers for Medicare & Medicaid Services (CMS) Contracting Officer's Representative (COR). This person is responsible for contract actions and works directly with the Contracting Officer.

Steps Involved In or Responsible For:

Create High-Level Project Schedule

Works With: Transition Team

Process: The Transition Team will develop a "high-level" ISG Transition Activities Project Schedule Template with SLAs.

Conduct CMS Transition Team Overview

Works With: Transition Team

Process: The Overview can begin after the Solicitation is issued. The Transition Lead will present topics to include:

- For Non-ISG Contracts: Review of Data, Infrastructure & Security ISG Questionnaire.
- Review of the Statement of Work (SOW) and Statement of Objective (SOO) including any transition-related deliverables.
- Review of the ISG Roles and Responsibilities Matrix
- Review of the "high level" ISG Transition Activities Project Schedule Template with SLAs (timeline should account for protest and potential delays resulting from protest)
- Review the ISG New Contractor On-boarding Checklist
- Review required documents and/or templates for obtaining user access to ISG systems (e.g., CMS system user request form, QNET Security Administrator Form, etc.)
- Review types of access needed for software and/or systems (e.g., SharePoint, QNET, ALM, etc.)

Set Up COR ServiceNow Access

Process: COR submits a HCQIS New User request, if they don't have HCQIS Access. If the CMS COR is not a member of the "CMS COR" group in ServiceNow, submit a miscellaneous request in HCQIS ServiceNow COR confirms access to Active Directory, PPS Contract Module, PPS Contract Dashboard, and the Onboarding request located in the ServiceNow IT Services

Catalog. If additional access needed, submit a miscellaneous request in HCQIS ServiceNow

Create Contract Transition Plan

Works With: Transition Team

Process: The Transition Team will finalize and approve the timeline that will be used to determine the length of the transition period.

Onboarding Worksheet

Works With: New Contractor

Process: The CMS COR will provide the New Contractor Point of Contact (POC) with an XLS Onboarding Worksheet to fill out. This worksheet can be provided by the Onboarding Lead or downloaded from the ServiceNow Catalog.

Complete and Submit Form in ServiceNow

Works With: HIDS Onboarding Lead

Process: The CMS COR and HIDS Onboarding Lead will fill out and submit the New Contractor Onboarding service request in ServiceNow using the completed XLS Onboarding Spreadsheet.

New Contract Kick-Off Meeting

Works With: Transition Team, New Contractor and HIDS

Process: The CMS COR and Transition Lead will conduct the Contract kick-off meeting with the Transition Team, New Contractor, and the HIDS Onboarding Lead.

Steps Involved In or Responsible For: Continued

Create and Approve Project Launch Plan

Works With: *New Contractor and Outgoing Contractor*

Process: *The CMS COR, New Contractor, and Outgoing contractor will create a transition or new project implementation timeline plan.*

Hold Contract Calls as Needed

Works With: *Transition Team, New Contractor and HIDS*

Process: *The Transition Team, New Contractor, CMS COR and HIDs will schedule and conduct calls regarding the contract as needed. This includes any security or infrastructure meetings or calls that need to take place. This will ensure that the New Contractor has all necessary knowledge, templates, hardware, software and security related items.*

Conduct Readiness Reviews

Works With: *Transition Team and New Contractor*

Process: *The CMS COR, Transition Team and the New Contractor will conduct a several Readiness Reviews prior to the end of the transition period or the Outgoing Contractor's contract end date. The results of the meeting are reported to the Transition Team.*

Conduct Transition Lessons Learned

Works With: *Transition Team and New Contractor*

Process: *The Transition Lead will conduct lessons learned with the New Contractor, CMS COR, and Transition Team. The lessons learned should identify process improvements or suggestions regarding the ISG New Contractor Onboarding Checklist.*

Additional Notes

Security Training

RBT & RoB Policy Training: A specialized training is now available titled *RBT & RoB Policy Updates: A Briefing for CORs*. All CORs are expected to take this training annually.

The COR training includes a review of RBT and RoB resource kits for use with CMS contractors. The training additionally covers the COR responsibilities for collecting training records demonstrating that all contractors with Significant Security and Privacy Responsibilities (SSR) complete specialized RBT commensurate with their roles within sixty (60) days of beginning work on a contract, annually thereafter and upon request. The COR is also responsible for implementing the *HHS Rules of Behavior for the Use of HHS Information and IT Resources Policy* prior to the completion of on-boarding for their contracting organizations. This requires contractors to acknowledge and accept the HHS RoB. The COR training addresses this responsibility and reporting process as well, which is similar to that for RBT.

Please access the training at cms.gov/cbt under the RBT menu on the Manage Training Information page. For additional guidance on RBT policy implementation, refer to the Risk Management Handbook Chapter 2 Awareness and Training, dated 02/27/2019. For more information on roles, visit [National Initiative for Cybersecurity Education \(NICE\) Cybersecurity Workforce Framework](#).

For additional security requirements and training view [Security Training and Reference Materials](#)