



# STEP: Conduct CMS Transition Overview

## Process:

In order to achieve a full understanding of the scope of the contract as well as all associated meetings, needs and activities, a CMS Contract Implementation Overview must be conducted. Topics to be discussed should include:

#	Item	Resource(s)
1	<b>For Non-ISG Contracts: Review of Data, Infrastructure &amp; Security ISG Questionnaire:</b> The ISG Questionnaire provides assistance in obtaining ISG approval and/or guidance for any IT data, infrastructure and security requirements necessary to complete the contract tasks. The information obtained from the questionnaire will be used in planning the transition timeline and deliverables.	ISG Questionnaire (CMS Sharepoint)
2	<b>Review of the Statement of Work (SOW) and Statement of Objective (SOO) including any transition related deliverable(s).</b>	N/A
3	<b>Review of the ISG Roles and Responsibilities Matrix:</b> The purpose of this document is identify the responsibilities for steps listed in Section 3 – Procedure Steps based on the required roles for completing the transition and Onboarding of New Contractors within ISG.	ISG Roles and Responsibilities Matrix
4	<b>Review of the “high level” ISG Transition Activities Project Schedule Template with SLAs (timeline should account for protest and potential delays resulting from protest):</b> The ISG Transition Activities Project Schedule Template is a tool that can be customized. It provides assistance to the Transition Lead in creating their transition project schedule because it includes transitions activities, durations, dependencies, and resource names to ensure that all transition activities can be completed by the transition end date.	Project Schedule Template
5	<b>Review the ISG New Contractor Onboarding Checklist:</b> The New Contractor Checklist includes the description of the activity, responsible entity/entities, reference documentation, duration when applicable and notes for each activity.	ISG New Contractor Onboarding Checklist
6	<b>Review required documents and/or templates for obtaining user access to ISG systems</b> (e.g., CMS system user request form, QNET Security Administrator Form, etc.)	Policies & Procedures (HCQIS SharePoint)
7	<b>Review types of access needed for software and/or systems</b> (e.g., SharePoint, QNET, ALM, etc.)	See <a href="#">Access and Tools Required</a> page for more information.

## TimeLine:

Once the Solicitation (Statement of Work (SOW), Statement of Objectives (SOO), etc.) is issued and the project schedule created, the Transition Team and the CMS COR should hold this meeting. Best practices suggest that this should transpire at least 60 days prior to the awarding of the contract.

## Participants:

*Architect Lead*

*Infrastructure Lead*

*Transition Lead*

*CMS COR*

*Project Manager*

*DSIF Onboarding Lead*

*Security Lead*