



## STEP: Conduct CMS Engagement Overview

### Process:

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 the following:

#	Item	Resource(s)
1	<b>For Non-ISG Contracts: Review of Data, Infrastructure and Security ISG Questionnaire:</b> The ISG Questionnaire helps 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>	Not applicable
3	<b>Review of the ISG Roles and Responsibilities Matrix:</b> The purpose of this document is to identify the responsibilities for the 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>View 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 aids the Engagement Lead in creating the 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.	<a href="https://share.cms.gov/center/CCSQ/ISG/ISG_Federal_Only_Standard_Operating_Procedures/Forms/AllItems.aspx">ISG New Contractor Onboarding Checklist</a> at <a href="https://share.cms.gov/center/CCSQ/ISG/ISG_Federal_Only_Standard_Operating_Procedures/Forms/AllItems.aspx">https://share.cms.gov/center/CCSQ/ISG/ISG_Federal_Only_Standard_Operating_Procedures/Forms/AllItems.aspx</a>
6	<b>Review of the 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.).	<a href="https://hcgis.sharepoint.com/forms/default.aspx">Policies &amp; Procedures (HCQIS SharePoint)</a> at <a href="https://hcgis.sharepoint.com/forms/default.aspx">https://hcgis.sharepoint.com/forms/default.aspx</a>
7	<b>Review of the types of access needed for software and/or systems</b> (e.g., SharePoint, QNET, ALM, etc.).	For more information, see <a href="https://confluence.hcgis.org/display/ISG/CO/Access+to+Services">Onboarding Into Services</a> in HCQIS Confluence at <a href="https://confluence.hcgis.org/display/ISG/CO/Access+to+Services">https://confluence.hcgis.org/display/ISG/CO/Access+to+Services</a> .

## TimeLine:

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

## Participants:

*Architect Lead*

*Infrastructure Lead*

*Engagement Lead*

*CMS COR*

*Project Manager*

*DSIF Onboarding Lead*

*Security Lead*