



Contract Checklists

The Contract Checklists table below provides a list of tasks that must be completed prior to beginning onboarding, during onboarding, and when offboarding a contract.

Table - Contract Checklists

Checklist	Tasks
Preboarding Checklist	<p>You are ready to onboard a contract after completing the following:</p> <ul style="list-style-type: none"> • Completed CBT Training at http://cms.gov/cbt: RBT & RoB Policy Updates: A Briefing for CORs. <p>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 to demonstrate that all contractors with SSR complete specialized RBT commensurate with their roles within sixty (60) days of beginning work on a contract, annually thereafter and upon request.</p> <ul style="list-style-type: none"> • Submitted final Acquisition Plan (AP) and Contract to OAGM. • All Contract and or AP revisions are submitted and finalized. <p>Checklist</p> <ol style="list-style-type: none"> 1. Request Security Documentation List 2. CMS System Access (Badging) 3. Conduct Contractor Facility Site Visit 4. Contract Award Activities 5. Create Contingency Plan Guidance 6. Data Use Agreement Approval 7. Finalize Site Survey Agreement 8. Identify COR 9. Identify ISG SMEs 10. Identify Security Documentation 11. Identify Tools and Systems Used 12. Identify Transition Team 13. Initial Meeting with COR 14. Prepare Contact Lists 15. Prepare Data and Knowledge Transfer Documentation 16. Prepare Overview of CMS and ISG ISSO 17. Prepare Project Meeting Details 18. Virtual Desktop Infrastructure Requirement

Checklist	Tasks
<p data-bbox="154 178 477 394">Onboarding Checklist at https://share.cms.gov/center/CCSQ/ISG/ISG_Federal_Only_Standard_Operating_Procedures/Forms/AllItems.aspx</p>	<p data-bbox="500 178 1466 321">The New Contractor Onboarding Checklist can be customized to meet your contract type. The checklist should include the description of the activity, responsible entity/entities, reference documentation, duration when applicable, and notes for each activity.</p> <p data-bbox="500 331 1446 514">We have provided a sample onboarding checklist, accessible by clicking the link to the left. It was created from the steps that the PM3 contractor completed during their Onboarding and transition period. The PM3 transition period was planned as a 90-calendar day period; however, based on the PM3 contract award date and the end of the incumbent's contract, it was less than 90 days.</p>