



Contract Checklists

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

Preboarding Checklist

You are ready to onboard a contract after completing the following:

Completed **CBT Training (cms.gov/cbt)**: RBT & RoB Policy Updates: A Briefing for CORs

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 SSR complete specialized RBT commensurate with their roles **within sixty (60) days of beginning work on a contract, annually thereafter and upon request.**

Submitted final **Acquisition Plan (AP) and Contract** to OAGM
All Contract and or AP revisions are submitted and finalized.

Checklist

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

**Onboarding
Checklist**

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.

We have provided a sample onboarding checklist, accessible by clicking on 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.