

# QualityNet Contract Services: Onboarding/Offboarding Procedures



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## Approvals

The undersigned acknowledge that they have reviewed the SOP and agree with the information presented within this document. Changes to this SOP will be coordinated with, and approved by, the undersigned, or their designated representatives.

**Table 1 - Approvals**

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## HOME

Welcome to QualityNet | Contract Services Onboarding and Offboarding Contractors to QualityNet IT Services.

The Information Systems Group (ISG) Contract Engagement team is responsible for onboarding new contractors and offboarding outgoing contractors to the Centers for Medicare & Medicaid Services (CMS) Healthcare Quality Information System (HCQIS) infrastructure, also known as QualityNet, and its information resources.

This site provides a central location for information regarding the process of onboarding or offboarding contractors to/from the QualityNet IT Services, including a dynamic timeline of when each step in the process is to occur and who is responsible for the action. Resources available to CMS Contracting Officer's Representatives (CORs) and contractors are also provided to ensure a smooth transition.

The ISG Contract Engagement team's role is to ensure that user access to QualityNet IT Services occurs seamlessly, whether onboarding a new contractor, transitioning an existing contractor, or closing out a contract with no award.

## Sections

The following is a brief description of the type of information found in each section:



### [Access to Services](#)

Identifies the QualityNet IT Services, CMS Services, and QPP ServiceNow Onboarding Processes available to contractors and how to gain access to them.



### [Onboarding Process](#)

Provides a dynamic timeline of the steps involved and who is responsible for onboarding new contractors to QualityNet IT Services.



### [Offboarding Process](#)

Identifies four scenarios for determining next steps when offboarding a contractor from QualityNet IT Services.



### [Roles and Responsibilities](#)

Describes the roles and responsibilities of those involved in the process of onboarding or offboarding contractors to/from QualityNet IT Services.



[Contact Us](#)

Provides contact information and responses to frequently asked questions regarding access to QualityNet IT Services.

## ACCESS TO SERVICES



### Access to Services

This section provides a summary of the services available to new or existing contractors onboarding to the HCQIS community. Also see [Access to Services](#) on QualityNet Confluence.

- **QualityNet IT Services** - Provides information and resources regarding the QualityNet IT Services available to contractors onboarding to the HCQIS community.
- **CMS Services** - Provides information and resources regarding Data User Agreements (DUAs); Enterprise User Administration (EUA) accounts; and Medicare Provider Enrollment, Chain, and Ownership System (PECOS) to help with setting up and managing contractor access to all of the accounts and tools needed to function and complete work within the HCQIS or ISG environment.
- **QPP ServiceNow** - Provides information regarding the Quality Payment Program (QPP) onboarding process through ServiceNow.

### QualityNet IT Services

The [QualityNet Communications Hub](#) is the resource for information on the [QualityNet IT Services](#) available to the HCQIS community.

#### Contractor Onboarding

The following steps provide guidance for access to these QualityNet IT Services based on whether you are a new contractor or an existing contractor requiring additional services.

#### New Contracts

Contractors that are new to QualityNet IT Services should follow this four-step process to begin onboarding after the contract's period of performance begins.

**Step One:** The CMS COR and New Contractor [create an engagement request](#) to identify the type of work to be performed and the services required.

**Step Two:** The CMS COR or New Contractor submits the completed Contract Engagement Request form to [ISGContractEngagement@hcqis.org](mailto:ISGContractEngagement@hcqis.org).

**Step Three:** The ISG Contract Engagement team [conducts an interview](#) with the CMS COR and New Contractor to confirm eligibility for these services and sends a request for approval of these services to the CMS Service Leads for processing.



**Step Four:** After the CMS Service Leads have processed the request, the ISG Contract Engagement team prepares and sends a welcome package to the New Contractor's Security Official (SO) to [complete the engagement process](#). The welcome package includes the following information:

- List of SO Responsibilities
- List of Approved Services
- Description of Approved Services
- Instructions for Onboarding Users

Upon receipt of this welcome package and informational materials, the New Contractor SO can begin the process of onboarding new users into the QualityNet IT Services. Access is based on the list of approved services provided in the package.

### Existing Contracts

If you are an existing contractor with QualityNet IT Services looking to obtain access to an additional service, follow this three-step process to begin onboarding.

**Step One:** The CMS COR or Contractor submits a request to obtain access to an additional service by emailing [ISGContractEngagement@hcqis.org](mailto:ISGContractEngagement@hcqis.org). The request should contain the following information:

- Name of Organization (HARP Organization Name Preferred)
- Name of QualityNet IT Service
- Business Justification for Use of Service
- Estimated Number of Users
- COR Approval

**Step Two:** The ISG Contract Engagement team sends a request for approval of the services to the CMS Service Leads for processing.

**Step Three:** After the CMS Service Leads have processed the request, the ISG Contract Engagement team prepares and sends a welcome package to the Contractor's Security Official (SO) to [complete the onboarding process](#). The welcome package includes the following information:

- List of SO Responsibilities
- List of Approved Services
- Description of Approved Services
- Instructions for Onboarding Users

Upon receipt of this welcome package and informational materials, the Contractor SO can begin the process of onboarding users into the QualityNet IT Service(s).

### CMS Services

Table 1. *CMS Services provides information and resources to help with setting up and managing contractor access to all accounts and tools he/she needs to function and complete work within the HCQIS or ISG Environment.*

**DISCLAIMER: ISG has no control over the services listed in the following table. Refer to the information provided for assistance.**

**Table 1. CMS Services**

| Access Type                              | Description   |
|--|---|
| <p><b>Data Use Agreements (DUAs)</b></p> | <p>CMS enters into DUAs with most data requesters for disclosures of protected health information (PHI) and/or personally identifiable information (PII) to ensure that data requesters adhere to CMS privacy and security requirements and data release policies. Refer to the <a href="#">Data Disclosures and Data Use Agreements (DUAs)</a> page for information on the categories of data files maintained by CMS and general guidelines for submission of DUAs. COR and contractor-specific guidance is provided on the <a href="#">Contractors</a> page, which includes DUA reminders regarding contact changes, DUA closures, and training materials for contractors and CORs.</p> <p>All CMS contractors requiring access to PHI/PII as well as their CORs must create and maintain their CMS DUAs through the <a href="#">Enterprise Privacy Policy Engine (EPPE)</a> system. Note that CMS CORs and contractors must complete EPPE training before accessing the system to submit DUA actions.</p> <p>The following prerequisites are required for access to the EPPE:</p> <ul style="list-style-type: none"> <li>• Obtain access to the CMS Portal - <a href="https://portal.cms.gov/">https://portal.cms.gov/</a></li> <li>• Download the VIP Access MFA Software - <a href="https://vip.symantec.com/">https://vip.symantec.com/</a></li> <li>• Obtain EIDM or EUA credentials and EPPE access by following the instructions in these documents:             <ul style="list-style-type: none"> <li>▪ <a href="#">Requesting EPPE User Role</a></li> <li>▪ <a href="#">Contractor Approval Workflow: CMS Contact (COR)</a></li> </ul> </li> </ul> <p>For assistance: EPPE Help Desk: 844-EPPE-DUA (844-377-3382) or <a href="mailto:EPPE@cms.hhs.gov">EPPE@cms.hhs.gov</a></p> <p>Refer to the <a href="#">CCSQ Data &amp; Analytics &gt; Data Resources &gt; Mapping DUAs to the CDR</a> page for information on how to correctly map your DUA to the Centralized Data Repository (CDR).</p> |

| Access Type   | Description   |
|---|---|
| <p><b>Enterprise User Administration (EUA) Accounts</b></p>                     | <ul style="list-style-type: none"> <li>• EUA is a system used by CMS to manage enterprise User IDs and passwords. It provides centralized administration of User IDs on the entire CMS enterprise including the mainframe systems, mid-tier devices such as AIX or Sunsystems, network operating systems such as Windows, and database platforms such as Oracle, Sybase, and MS SQL. The system utilizes online data to automate the approval process for access requests and provides logging and auditing support.</li> <li>• If EUA Access is required, please read The <a href="#">Enterprise User Administration Access Approvers Guide</a>, which resides on CMS intranet.</li> <li>• The CMS COR should work with the contractor to ensure that all the necessary security paperwork is completed (e.g., HHS 745, Application for Access to CMS Computer Systems, Security Training and PIV Training Certification). The CMS COR should ensure that the paperwork is submitted and processed so that the New Contractor has their access and badging completed within the dates of the transition timeline.</li> <li>• An email should be sent to the new EUA users providing additional information including timeline, how to set up their password and how to choose job codes.</li> </ul> <p>For assistance: CMS IT Service Desk: <a href="mailto:CMS_IT_Service_Desk@cms.hhs.gov">CMS IT Service Desk@cms.hhs.gov</a> or 1-800-562-1963_or 410-786-2580</p> |
| <p><b>Medicare Provider Enrollment, Chain, and Ownership System (PECOS)</b></p> | <p>PECOS supports the Medicare Provider and Supplier enrollment process by allowing registered users to securely and electronically submit and manage Medicare enrollment information.</p> <ul style="list-style-type: none"> <li>• <a href="#">Request PECOS accounts.</a></li> <li>• For any questions regarding PECOS account, please go to <a href="https://nppes.cms.hhs.gov/IAWeb/">https://nppes.cms.hhs.gov/IAWeb/</a>.</li> </ul> <p>For assistance: CMS External User Services: By Chat: <a href="#">Live Chat Launch</a>; By E-mail: <a href="mailto:EUSupport@cgi.com">EUSupport@cgi.com</a>; By Phone: Toll-Free: (866) 484-8049 TTY/TDD: (866) 523-4759</p>   |

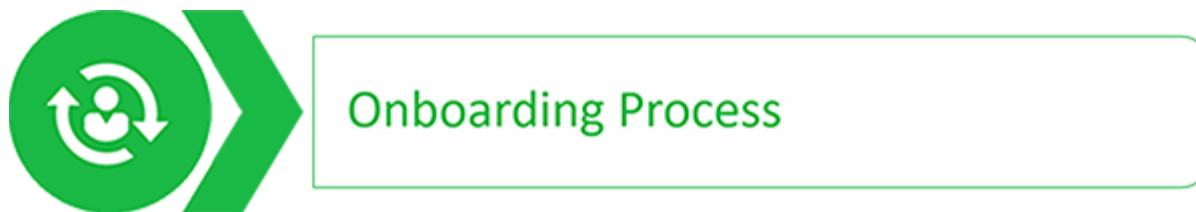
## QPP ServiceNow

Documentation on the Quality Payment Program (QPP) Onboarding process steps can be found on [CMS Quality Payment Program \(QPP\) Onboarding Confluence Page](#).

QPP ServiceNow access provides the contractor access to the ServiceNow instance in support of questions submitted for the Quality Payment Program (QPP). This access allows contractors to view and respond to questions submitted to their respective content areas. For further information regarding QPP ServiceNow access and ServiceNow group requests, please access the [HCQIS ServiceNow](#) Confluence page.

**QPP Confluence Access:** *The CONFL\_User EUA job code is needed to access the Confluence pages referenced on this page.*

## ONBOARDING PROCESS



This section provides guidance to CMS ISG team members and ISG contractors on the overall onboarding process into QualityNet IT Services. The following timeline identifies what occurs and when during the onboarding/offboarding process. The first five entries in the timeline refer to the activities involved in the onboarding process. Note that this timeline may vary based on your contract.

### QualityNet Contract Services Onboarding/Offboarding Timeline

To learn more about the actions required and who is responsible for each action, see [Onboarding Process](#) on QualityNet Confluence.

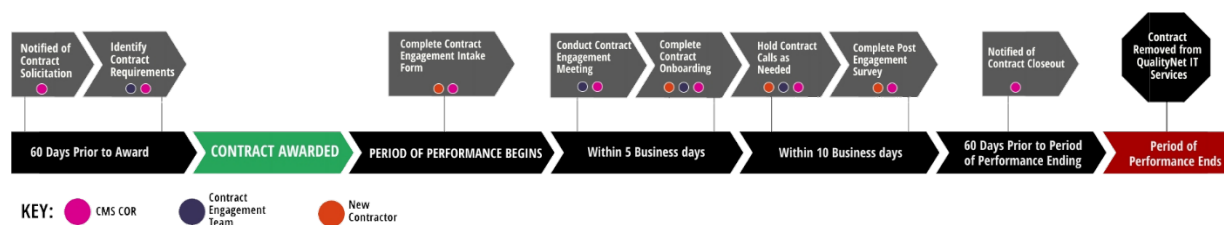
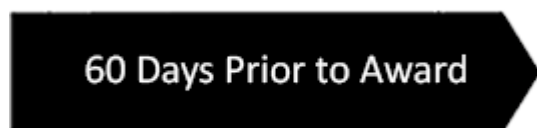


Figure 1. QualityNet Contract Services: Onboarding/Offboarding Timeline

Refer to the [Offboarding Process](#) as the contract's Period of Performance nears its end to determine what actions are required and who is responsible.

#### 60 Days Prior to Award



- **Notify of Contract Solicitation**

The CMS COR notifies the ISG Contract Engagement team of a new contract solicitation and provides an estimated award date at the following email address:

[ISGContractEngagement@hcqis.org](mailto:ISGContractEngagement@hcqis.org).

Note: Only a high-level notice is needed; only provide contract specifics that are publicly available as contractors have access to the email address and only non-sensitive information should be included.

**Responsible Parties:** CMS COR

- **Identify Contract Requirements**

The CMS COR works with the ISG Contract Engagement team to identify high-level service requirements for the new contract to gain a better understanding of what QualityNet IT Services apply. Some contract types, such as ADOs, already have a package of services pre-approved for use.

If this is not an ISG contract, please fill out the [ISG Questionnaire](https://share.cms.gov/center/CCSQ/ISG/SitePages/ISG%20Questionnaire.aspx) (<https://share.cms.gov/center/CCSQ/ISG/SitePages/ISG%20Questionnaire.aspx>) and provide the approved ISG Questionnaire to the ISG Contract Engagement team to assist with requirements gathering.

**Responsible Parties:** CMS COR, ISG Contract Engagement Team

## Contract Awarded



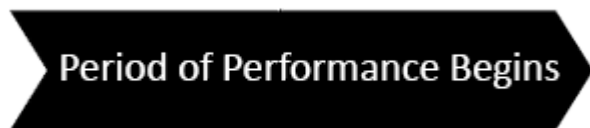
The CMS ISG selects and contacts the New Contractor. Thereafter, ISG prepares the official approval of the contract to send to the New Contractor. The contract is then executed by the New Contractor. **No work can start nor meetings be scheduled with the New Contractor until the Period of Performance (POP) begins.** *The New Contractor must identify a Security Point of Contact (SPOC) and Security Official (SO) within one (1) day of the contract award.* See QNet Confluence for [Contract Awarded](#).

- **Notify of Contract Award**

The CMS COR notifies the ISG Contract Engagement team of a new contract award at the following email address: [ISGContractEngagement@hcqis.org](mailto:ISGContractEngagement@hcqis.org).

**Responsible Parties:** CMS COR

## Period of Performance Begins



The Period of Performance (POP) is the time span between the effective date of a contract (when the contracted effort begins) and the last day under the contract in which deliveries of goods are made or services are performed. When the POP begins all meetings, work and calls can proceed.

- **Complete Contract Engagement Intake Form**

The CMS COR and New Contractor completes the [Contract Engagement Intake Form](#) to identify the type of work to be performed and the services required. Refer to the [CMS Services](#) tab for guidance on the Data Use Agreement (DUA) process.

- *Designate initial contractor Security Official (SO) to review contractor access to approved QualityNet IT Services.*

- *Designate initial contractor Security Point of Contact (SPOC) who will ensure security compliance.*

Upon completion, the CMS COR or New Contractor submits the form to the ISG Contract Engagement team at [ISGContractEngagement@hcgis.org](mailto:ISGContractEngagement@hcgis.org).

**Responsible Parties:** CMS COR, New Contractor, ISG Contract Engagement Team

### Within 5 Business Days

#### Within 5 Business Days

- **Conduct Contract Engagement Meeting**

The ISG Contract Engagement team conducts a meeting with the CMS COR and New Contractor to confirm eligibility for the services identified in the Contract Engagement Intake Form and sends a request for approval of these services to the CMS Service Leads for processing.

**Responsible Parties:** ISG Contract Engagement Team, CMS COR, New Contractor

- **Complete Contract Onboarding**

After the CMS Service Leads have processed the request, the ISG Contract Engagement team prepares and sends a welcome package to the New Contractor's Security Official (SO) to complete the engagement process. The welcome package includes the following information:

- List of SO Responsibilities
- List of Approved Services
- Description of Approved Services
- Instructions for Onboarding Users

Upon receipt of this welcome package and informational materials, the New Contractor SO can begin onboarding new users into the QualityNet IT Services. Access is based on the list of approved services provided in the package.

**Responsible Parties:** ISG Contract Engagement Team, CMS Service Leads; New Contractor

### Within 10 Business Days

#### Within 10 Business Days

- **Hold Contract Calls as Needed**

The CMS COR and ISG Contract Engagement team conducts touch point calls with the New Contractor. During these calls, the teams ensure that the New Contractor has all the necessary knowledge, templates, and points of contact (POCs) for any formal security deliverables or other security-related items within the dates of the engagement timeline. The teams also ensure that the New Contractor has all necessary hardware and software ordered, delivered, and installed within the dates of the engagement timeline. The ISG Contract Engagement team is responsible for archiving documentation of the results of the meetings/calls.

**Responsible Parties:** CMS COR, ISG Contract Engagement Team, New Contractor

- **Complete Post-Engagement Survey**

The ISG Contract Engagement team forwards link to [Contract Engagement Post-Onboarding Survey](#) to New Contractor for response. The goal of the survey is to assist the team in creating an effective and efficient onboarding process.

**Responsible Parties:** ISG Contract Engagement Team, New Contractor

## Procedures for Completing the Contract Engagement Intake Form

When the Contract has been awarded and the period of performance has begun, the first step is to determine what kind of work the contractor will perform to meet the deliverables. The type of work that the contractor does determines if QualityNet IT Services is needed.

To start this process, the CMS COR and New Contractor must complete an initial form to request the start of the contract engagement. Based on the information provided, the ISG Contract Engagement team determines if QualityNet IT Services is needed.

If the New Contractor needs these services, an interview is scheduled. Using the information provided, the ISG Contract Engagement team prepares for the interview, ensuring the attendance of all necessary parties. The gathered information will also be used for entitlements and permissions for key roles in HARP.

Click to download the [Contract Engagement Intake Form](#).

The following information must be provided:

- Contract Number (Required)
- Task Order Number (if applicable)
- DUA Number (required for SAS VIYA)
- Period of Performance start and end dates (Required)
- Contract Short Name (Required)
- Contract Full Legal Name (Required)
- Prime Contractor Company Name (Required)
- Contract Category (ADO, NQIC, BFCC, ESRD, Support, Analytics) (Required)
- Contracting Officer Representative (COR) (Required)
- COR HARP ID (Required)
- Contractual Duties (Mandatory)
- Contractor POC Name and Corporate Email (Required)
- Security Point of Contact (SPOC) - First Name, Last Name, Corporate Email, and Phone Number (Required)
- Security Point of Contact HARP ID (Required)

- Security Official (SO) Information - First Name, Last Name, Corporate Email, and Phone Number (Required)
- Security Official HARP ID (Required)

Upon completion, the CMS COR or New Contractor submits the form to the ISG Contract Engagement team at [ISGContractEngagement@hcgis.org](mailto:ISGContractEngagement@hcgis.org).



## OFFBOARDING PROCESS



This section provides guidance for offboarding a contractor's access to QualityNet IT Services before the contract Period of Performance (POP) end date. Also see [Offboarding Process](#) on QualityNet Confluence.

When a contract's POP is coming to an end, the ISG Contract Engagement team assists with any transition or removal of user and data access to QualityNet IT Services. To ensure that a smooth and secure process is followed when closing out the contract, the ISG Contract Engagement team contacts the CMS COR 60 days before the contract POP end date to initiate closeout activities.

The CMS COR selects one of the following closeout scenarios and provides the requested information.

The last two entries in the timeline refer to the activities involved in the offboarding process. Note that this timeline may vary based on your contract.

### QualityNet Contract Services Onboarding/Offboarding Timeline

To learn more about the actions required and who is responsible for each action, see [Offboarding Process](#) on QualityNet Confluence.

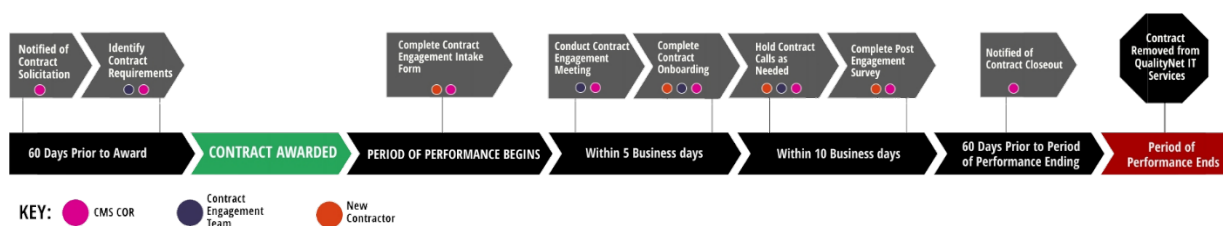
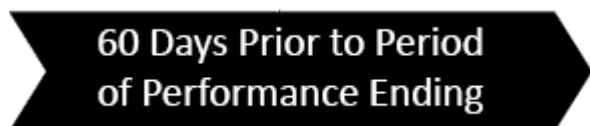


Figure 2. QualityNet Contract Services: Onboarding/Offboarding Timeline

Refer to the [Onboarding Process](#) to determine what actions are required and who is responsible prior to and after award of a contract.

#### 60 Days Prior to Period of Performance Ending



- Notification of Contract Closeout

The ISG Contract Engagement team tracks contracts that use QualityNet IT Services from contract start to end. To ensure a smooth and secure process is followed for closing out an existing contract's access to these services, the team contacts the CMS COR 60 days before the contract POP end date to initiate closeout activities.

These activities start by communicating which scenario occurs when it is known to the Contract Engagement team. Based on the scenario, the ISG Contract Engagement team requests additional information needed to coordinate user access.

The CMS COR is asked to select one of the following closeout scenarios and provide the requested information:

- **Scenario 1:** Contract ends, and a new contract is re-awarded to the incumbent.

Under this scenario, the team attempts to allow the contractors to retain their current access to QualityNet IT Services.

The following information is requested to accomplish this goal:

- New Contract Name (if applicable)
- New period of performance (POP)
- New Contract and Task Order Numbers (if applicable)
- For contracts that utilize SAS VIYA or a service that requires a Data Use Agreement (DUA), validate the DUA is still active.

If not, a new DUA is required and access is paused until the PDF copy of the updated/new DUA is provided.

- Confirm that the Security Official (SO) and Security Point of Contact (SPOC) remain the same.

If not, provide new SO and SPOC names and HARP IDs.

- Determine if any data the contractor worked on for CMS needs to be archived and if contractor needs the same data for a new contract.

- **Scenario 2:** Contract ends, and a new contract is awarded to another contractor.

Under this scenario, the team coordinates the timely removal of the contractor's access to the QualityNet IT Services and coordinates the onboarding process with the new contractor.

The following information is requested to accomplish this goal:

- Confirm the POP end date for the current contractor so the team can coordinate the timely removal of the contractor's access to QualityNet IT Services.
- Determine if any data the contractor worked on for CMS needs to be archived and if the new contractor may need the data.

**Note:** The new contract follows the New Contract Onboarding Process. A separate communication is sent to the CMS COR on this process when the contract is awarded.

- **Scenario 3:** Contract ends without a new version of the contract being awarded.

Under this scenario, the team coordinates the timely removal of the contractor's access to the QualityNet IT Services and ensures that all CMS data is archived.

The following information is requested to accomplish this goal:

- Confirm the POP end date for the current contractor so the team can coordinate the timely removal of the contractor's access to QualityNet IT Services.

- Determine if any data the contractor worked on for CMS needs to be archived.
- **Scenario 4:** Contract POP is extended.  
Under this scenario, the team updates existing records with the new contract information.  
The following information is requested to accomplish this goal:
  - Confirm the new POP end date for the team's tracking purposes.
  - If using SAS Viya or another service requiring a Data Use Agreement (DUA), confirm the contractor's DUA is valid through the new POP end date. If any updates to the DUA, a PDF copy of the updated DUA is required.

### Period of Performance Ends



- **Contract Removed from QualityNet IT Services**  
The ISG Contract Engagement team removes user access to QualityNet IT Services based on the scenario identified by the CMS COR.  
**Responsible Parties:** ISG Contract Engagement Team

## ROLES AND RESPONSIBILITIES



### Roles & Responsibilities

This section lists the roles and responsibilities of those individuals who ISG Management has identified as playing a part in the onboarding or offboarding of contractors to the QualityNet IT Services. Included is a general description of the role, the steps involved in the onboarding/offboarding process in which they participate, and who they interact with during each step. Also see [Roles & Responsibilities](#) on QualityNet Confluence.

### **CMS Contracting Officer's Representative**

The CMS COR is an integral part of the ISG contract engagement process, representing CMS and supporting the new contracting organization to ensure all CMS contract requirements are met and all new contractor questions and needs are addressed for a successful onboarding experience. In addition, the CMS COR assists in closing out contracts, which can include extending or transitioning efforts to a new contractor.

### **Security Training**

Refer to the Security tab on the [QualityNet Communications Hub](#).

### **Responsibilities**

The CMS COR responsibilities are presented following the timeline for the processes involved in onboarding or offboarding contractors to the QualityNet IT Services, as well as activities conducted during the contract's period of performance. See *Table 2. CMS COR Responsibilities*.

Table 2. CMS COR Responsibilities

| Step                       | Responsibilities   |
|----------------------------|--|
| <b>Onboarding Process</b>  | <p data-bbox="396 323 748 352"><a href="#">60 Days Prior to Contract Award</a></p> <ul data-bbox="396 365 1414 758" style="list-style-type: none"> <li data-bbox="396 365 1414 464"> <b>Notify of contract solicitation.</b><br/>           The CMS COR should provide only contract specifics that are publicly available, such as the contract solicitation number and estimated award date.         </li> <li data-bbox="396 476 1414 758"> <b>Identify contract requirements.</b><br/>           The CMS COR works with the ISG Contract Engagement team to identify high-level service requirements for the new contract to gain a better understanding of what QualityNet IT Services apply. Some contract types, such as ADOs, already have a package of services pre-approved for use.<br/><br/>           If this is not an ISG contract, the CMS COR completes the <a href="#">ISG Questionnaire</a> and provides the approved ISG Questionnaire to the ISG Contract Engagement team to assist with requirements gathering.         </li> </ul> <p data-bbox="396 770 594 800"><a href="#">Contract Awarded</a></p> <ul data-bbox="396 812 1398 911" style="list-style-type: none"> <li data-bbox="396 812 1398 911"> <b>Notify of contract award.</b><br/>           The CMS COR notifies the ISG Contract Engagement team of a new contract award at the following email address: <a href="mailto:ISGContractEngagement@hcqis.org">ISGContractEngagement@hcqis.org</a>.         </li> </ul> <p data-bbox="396 924 719 953"><a href="#">Period of Performance Begins</a></p> <ul data-bbox="396 966 1370 1073" style="list-style-type: none"> <li data-bbox="396 966 1370 1073"> <b>Complete Contract Engagement Intake form.</b><br/>           The CMS COR works with the New Contractor to complete the <a href="#">Contract Engagement Intake</a> form by identifying the type of work to be performed and the services required.         </li> </ul> <p data-bbox="396 1085 647 1115"><a href="#">Within 5 Business Days</a></p> <ul data-bbox="396 1127 1406 1304" style="list-style-type: none"> <li data-bbox="396 1127 1406 1304"> <b>Conduct contract engagement meeting.</b><br/>           Upon receipt of the intake form, the CMS COR and New Contractor meet with the ISG Contract Engagement team to confirm eligibility for the services identified in the Contract Engagement Intake form. Upon confirmation, the ISG Contract Engagement team sends a request for approval of these services to the CMS Service Leads for processing.         </li> </ul> <p data-bbox="396 1316 662 1346"><a href="#">Within 10 Business Days</a></p> <ul data-bbox="396 1358 1395 1528" style="list-style-type: none"> <li data-bbox="396 1358 1395 1528"> <b>Hold contract calls as needed.</b><br/>           The CMS COR and the ISG Contract Engagement team conduct touchpoint meetings with the New Contractor to ensure the organization has all the necessary knowledge, templates, and points of contact (POCs) for any formal security deliverables or other security-related items within the dates of the engagement timeline.         </li> </ul> |
| <b>Offboarding Process</b> | <p data-bbox="396 1547 899 1577"><a href="#">60 Days Prior to Period of Performance Ending</a></p> <ul data-bbox="396 1589 1398 1759" style="list-style-type: none"> <li data-bbox="396 1589 1398 1759"> <b>Notify of contract closeout.</b><br/>           The CMS COR sends an email to the ISG Contract Engagement team that identifies one of four scenarios that will occur when a contract's period of performance ends. The ISG Contract Engagement team responds, requesting additional information needed to coordinate user access to QualityNet IT Services.         </li> </ul>  |

| Step                               | Responsibilities  |
|------------------------------------|---|
| <p><b>Contract Maintenance</b></p> | <p>During the contract's Period of Performance (POP), three actions for QualityNet IT Services may require CMS COR involvement:</p> <ul style="list-style-type: none"> <li> <p>• <b>Action 1: Assignment of new COR.</b><br/>                     The ISG Contract Engagement team should be advised immediately upon reassignment if a new COR is assigned to the contract so that the HARP and ServiceNow records can be updated accordingly. An email should be sent to <a href="mailto:ISGContractEngagement@hcgis.org">ISGContractEngagement@hcgis.org</a>.</p> </li> <li> <p>• <b>Action 2: Approval of additional SPOCs.</b><br/>                     The CMS COR approves additional contractor Security Points of Contact (SPOC), as needed. The CMS COR needs a HARP ID to approve/reject additional SPOC requests. Refer to the <a href="#">Quality   HARP</a> for instructions on getting started with a HARP ID.<br/>                     NOTE: The first SPOC is set up by the ISG Contract Engagement team during the onboarding process.</p> </li> <li> <p>• <b>Action 3: Approve additional QualityNet IT Services.</b><br/>                     The CMS COR approves additional QualityNet IT Services if a contract requires additional services after initial onboarding is completed. The ISG Contract Engagement team requests approval by the CMS COR via email.</p> </li> </ul> |

## ISG Contract Engagement Team

The ISG Contract Engagement team coordinates the transition between incoming and outgoing contracts. The team ensures all activities occur on schedule, addresses and supports activities as needed, and escalates any transition-related issues to ISG Management. The team includes CMS Service Leads who process all requests for approval of QualityNet IT Services.

### Security Training

The ISG Contract Engagement team knows the necessary security forms and requirements that the New Contractor needs to meet and works with the CMS COR and HCQIS Security to answer any questions that the contracting organization asks.

For additional security requirements and training, refer to the Security tab on the [QualityNet Communications Hub](#).

### Responsibilities

The ISG Contract Engagement team responsibilities are presented following the timeline for the processes involved in onboarding or offboarding contractors to the QualityNet IT Services, as well as activities conducted during the contract's POP. See Table 3. *ISG Contract Engagement Responsibilities*.

**Table 3. ISG Contract Engagement Responsibilities**

| Step                              | Responsibilities   |
|-----------------------------------|--|
| <p><b>Onboarding Process</b></p>  | <p><a href="#">60 Days Prior to Contract Award</a></p> <ul style="list-style-type: none"> <li> <p><b>Identify contract requirements.</b><br/>The ISG Contract Engagement team works with the CMS COR to identify high-level service requirements for the new contract to gain a better understanding of what QualityNet IT Services apply. Some contract types, such as ADOs, already have a package of services pre-approved for use.</p> </li> </ul> <p><a href="#">Period of Performance Begins</a></p> <ul style="list-style-type: none"> <li> <p><b>Complete Contract Engagement Intake form.</b><br/>The ISG Contract Engagement team receives the completed Contract Engagement Intake form and begins the onboarding process.</p> </li> </ul> <p><a href="#">Within 5 Business Days</a></p> <ul style="list-style-type: none"> <li> <p><b>Conduct contract engagement meeting.</b><br/>Upon receipt of the intake form, the ISG Contract Engagement team meets with the CMS COR and New Contractor to confirm eligibility for the services identified in the Contract Engagement Intake form and sends a request for approval of these services to the CMS Service Leads for processing.</p> </li> <li> <p><b>Complete contract onboarding.</b><br/>After the CMS Service Leads have processed the requests for services, the ISG Contract Engagement team prepares and sends a welcome package to the New Contractor's Security Official (SO) to complete the engagement process.</p> </li> </ul> <p><a href="#">Within 10 Business Days</a></p> <ul style="list-style-type: none"> <li> <p><b>Hold contract calls as needed.</b><br/>The CMS COR and the ISG Contract Engagement team conduct touchpoint meetings with the New Contractor to ensure the organization has all the necessary knowledge, templates, and points of contact (POCs) for any formal security deliverables or other security-related items within the dates of the engagement timeline.</p> </li> <li> <p><b>Complete Post-Engagement Survey.</b><br/>The ISG Contract Engagement team forwards link to <a href="#">Contract Engagement Post-Onboarding Survey</a> to New Contractor for response. The goal of the survey is to assist the team in creating an effective and efficient onboarding process.</p> </li> </ul> |
| <p><b>Offboarding Process</b></p> | <p><a href="#">60 Days Prior to Period of Performance Ending</a></p> <ul style="list-style-type: none"> <li> <p><b>Notify of contract closeout.</b><br/>The ISG Contract Engagement team receives an email from the CMS COR that identifies one of four scenarios that will occur when a contract's period of performance ends. The ISG Contract Engagement team responds, requesting additional information needed to coordinate user access to QualityNet IT Services.</p> </li> </ul> <p><a href="#">Period of Performance Ends</a></p> <ul style="list-style-type: none"> <li> <p><b>Contract removed from QualityNet IT Services.</b><br/>The ISG Contract Engagement team removes user access to QualityNet IT Services based on the scenario identified by the CMS COR.</p> </li> </ul>   |

| Step                        | Responsibilities   |
|-----------------------------|--|
| <b>Contract Maintenance</b> | <p>During the contract's Period of Performance (POP), one action for QualityNet IT Services requires ISG Contract Engagement team involvement:</p> <ul style="list-style-type: none"> <li> <b>Action 1: Assignment of new COR.</b><br/>           The ISG Contract Engagement team should be advised immediately upon reassignment if a new COR is assigned to the contract so that the HARP and ServiceNow records can be updated accordingly. An email should be sent to <a href="mailto:ISGContractEngagement@hcgis.org">ISGContractEngagement@hcgis.org</a>.         </li> </ul> |

## Contractors

Contractors represent the organizations that are either onboarding or offboarding to QualityNet IT Services.

### Security Training

As part of the contract engagement process, contractors are required to designate at least one Security Official (SO) and Security Point of Contact (SPOC).

For additional security requirements and training, refer to [Security Awareness and Training](#) on the QualityNet Communications Hub.

- **Security Official**

The SO is responsible for the following:

- Communicate to users in your organization how to request access to the QualityNet IT Services approved for your contract/organization.
- Review and approve all new user requests for these services.

**NOTE:** Only approved user requests that come directly from your contract/organization.

- Remove users who no longer require access to these services.
- Approve other SOs within your organization, as needed, to assist with the above tasks.

Refer to the [Security Official Role](#) on the [QualityNet | HARP](#) page for instructions on requesting the SO role in HARP. When your request is approved, you can review and approve requests from members of your organization for access to the desired services. You can also remove users' access to services no longer needed.

To ensure a smooth and quick start to utilizing the approved services, the Contract Engagement team recommends the following actions be taken:

- **ACTION 1:** Ensure all users have HARP IDs.  
*For instructions on the process, refer to the [QualityNet | HARP](#) page.*
- **ACTION 2:** Notify members that they may now request above services.  
*Refer to the [QualityNet IT Services](#) page for instructions on the user request process for each service.*
- **ACTION 3:** Approve user access to the services.



*As an approved SO for your organization, you can now approve or reject user role requests. For instructions on this process, refer to the Security Official Role tab on the [QualityNet | HARP](#) page.*

### Resources

[QualityNet | HARP](#)

[QualityNet IT Services](#)

- **Security Point of Contact**

Each organization is required to designate at least one (1) Security Point of Contact (SPOC) who is responsible for ensuring the organization complies with CMS security requirements and policies. You may access the Policies/Procedures and Security Awareness Training by going to <https://qnetconfluence.cms.gov/> and selecting Security. The SPOC is responsible for reporting and handling security incidents that occur within the organization.

When a contract is awarded, the CMS COR designates the first SPOC who will be established in ServiceNow. When an organization needs to add, update, replace or make any changes to the SPOC it can do so via the HARP application following the instructions below. Upon approval, the SPOC is stored and tracked through ServiceNow for general tracking and maintenance.

[HCQIS ServiceNow](#) – Refer to Security POC tab on this page for requesting assignment as your organization's SPOC for a program. *Note that your CMS COR must have a HARP account for your request to be approved.*

### Security Awareness and Training

During the onboarding process, and before accessing any HCQIS system or application, each user must sign [HCQIS Rules of Behavior](#), complete the appropriate training, and provide evidence of training completion to their Security Point of Contact (SPOC). The SPOC tracks all required training within their organization. In many cases, an annual attestation is also provided to the organization's CMS Contracting Officer's Representative (COR) as a deliverable.

For additional information, refer to the [Security Awareness & Training](#) page on the QualityNet Communications Hub.

### Resources

[HCQIS ServiceNow](#)

[QualityNet Security](#) – Central source of security-related information and reference material.

## Responsibilities

The Contractor responsibilities are presented following the timeline for the processes involved in onboarding or offboarding contractors to the QualityNet IT Services, as well as activities conducted during the contract's period of performance. See *Table 4. Contractor Responsibilities*.

**Table 4. Contractor Responsibilities**

| Step                             | Responsibilities   |
|----------------------------------|--|
| <p><b>Onboarding Process</b></p> | <p><a href="#">Contract Awarded</a></p> <ul style="list-style-type: none"> <li>• The New Contractor is contacted by the CMS ISG of contract award. Thereafter, ISG prepares the official approval of the contract and sends the approval to the New Contractor. The contract is then executed by the New Contractor. <b>No work can start or meetings be scheduled with the New Contractor until the Period of Performance (POP) begins.</b></li> <li>• The New Contractor must identify a Security Point of Contact (SPOC) and Account Administrator (AA) within one (1) day of the contract award.</li> </ul> <p><a href="#">Period of Performance Begins</a></p> <ul style="list-style-type: none"> <li>• <b>Complete Contract Engagement Intake form.</b><br/>The New Contractor works with the CMS COR to complete the <a href="#">Contract Engagement Intake</a> form by identifying the type of work to be performed and the services required.</li> </ul> <p><a href="#">Within 5 Business Days</a></p> <ul style="list-style-type: none"> <li>• <b>Conduct contract engagement meeting.</b><br/>Upon receipt of the intake form, the New Contractor and CMS COR meet with the ISG Contract Engagement team to confirm eligibility for the services identified in the Contract Engagement Intake form. Upon confirmation, the ISG Contract Engagement team sends a request for approval of these services to the CMS Service Leads for processing.</li> <li>• <b>Complete contract onboarding.</b><br/>The New Contractor's Security Official (SO) completes the engagement process upon receipt of welcome package from the ISG Contract Engagement team. The welcome package is sent after the CMS Service Leads have processed the requests for services.</li> </ul> <p><a href="#">Within 10 Business Days</a></p> <ul style="list-style-type: none"> <li>• <b>Hold contract calls as needed.</b><br/>The New Contractor participates in touchpoint meetings conducted by the CMS COR and the ISG Contract Engagement team to ensure the organization has all the necessary knowledge, templates, and points of contact (POCs) for any formal security deliverables or other security-related items within the dates of the engagement timeline.</li> <li>• <b>Complete Post-Engagement Survey.</b><br/>The New Contractor receives link to <a href="#">Contract Engagement Post-Onboarding Survey</a> from the ISG Contract Engagement team. The Contractor's response assists the team in creating an effective and efficient onboarding process.</li> </ul> |

| Step                               | Responsibilities  |
|------------------------------------|---|
| <p><b>Offboarding Process</b></p>  | <p><a href="#">60 Days Prior to Period of Performance Ending</a></p> <ul style="list-style-type: none"> <li> <p><b>Notify of contract closeout.</b><br/>The Contractor works with the CMS COR in responding to one of four scenarios that occur when a contract's period of performance ends and additional information that is needed by the ISG Contract Engagement team to coordinate user access to QualityNet IT Services.</p> </li> </ul> <p><a href="#">Period of Performance Ends</a></p> <ul style="list-style-type: none"> <li> <p><b>Contract removed from QualityNet IT Services.</b><br/>The Contractor's user access to QualityNet IT Services is removed or transitioned by the ISG Contract Engagement team based on the scenario identified by the CMS COR.</p> </li> </ul>  |
| <p><b>Contract Maintenance</b></p> | <p>During the contract's Period of Performance (POP), two actions for QualityNet IT Services require Contractor involvement:</p> <ul style="list-style-type: none"> <li> <p><b>Action 1: Approval of additional SPOCs.</b><br/>The Contractor seeks approval from the CMS COR for additional Security Points of Contact (SPOC), as needed. The CMS COR needs a HARP ID to approve/reject additional SPOC requests. Refer to the <a href="#">QualityNet   HARP</a> for instructions on getting started with a HARP ID.</p> <p><b>NOTE:</b> The first SPOC is set up by the ISG Contract Engagement team during the onboarding process.</p> </li> <li> <p><b>Action 2: Approve additional QualityNet IT Services.</b><br/>The CMS COR or Contractor submits a request to obtain access to an additional service by emailing <a href="mailto:ISGContractEngagement@hcqis.org">ISGContractEngagement@hcqis.org</a>. Refer to the <a href="#">Onboarding Process &gt; Period of Performance Begins</a> for guidance on how to request additional services as an existing contractor.</p> </li> </ul> |

## CONTACT US



Contact Us

This section provides contact information and answers to frequently asked questions (FAQs) regarding the process of onboarding to or offboarding from QualityNet IT Services.

### Points of Contact

If you have questions, issues, or suggestions, refer to the following on who to contact and how to do so, whether by email, phone, or Slack, as applicable. Also see [Contact Us](#) on QualityNet Confluence.

- **QualityNet IT Services**

Please contact the Service Center with any questions regarding QualityNet IT Services:

- Phone: 1-866-288-8914 (TRS: 711)
- Email: [ServiceCenterSOS@cms.hhs.gov](mailto:ServiceCenterSOS@cms.hhs.gov)
- Slack: #help-service-center-sos

- **Contract Services**

- Email: [ISGContractEngagement@HCQIS.org](mailto:ISGContractEngagement@HCQIS.org)

- **Contractors**

If there are any Office of Information Technology (OIT) services that we do not offer, please reach out to your CMS COR.

### Frequently Asked Questions

**Q: Need Help?**

A: For questions, please contact [ISGContractEngagement@hcqis.org](mailto:ISGContractEngagement@hcqis.org).

**Q: Who do I contact if I require additional QualityNet IT Services?**

A: Refer to the steps below for information on who to contact depending on whether it is a new or existing contract.

- **New Contract**

**Step One:** The CMS COR and New Contractor complete the [Contract Engagement Intake Form](#) to identify the type of work to be performed and the services required. Refer to the [CMS Services](#) tab for guidance on the Data Use Agreement (DUA) process.

- Designate initial contractor Security Official (SO) to review contractor access to approved QualityNet IT Services.
- Designate initial contractor Security Point of Contact (SPOC) who will ensure security compliance.

**Step Two:** Upon completion, the CMS COR or New Contractor submits the form to the ISG Contract Engagement team at [ISGContractEngagement@hcqis.org](mailto:ISGContractEngagement@hcqis.org).

- **Existing Contract**

**Step One:** The CMS COR or Contractor submits a request to obtain access to an additional QualityNet IT Service by emailing [ISGContractEngagement@hcqis.org](mailto:ISGContractEngagement@hcqis.org). The request should contain the following information:

- Name of Organization (HARP Organization Name preferred)
- Name of QualityNet IT Service
- Business Justification for Use of Service
- Estimated Number of Users
- COR Approval

**Step Two:** The ISG Contract Engagement team sends a request for approval of the services to the appropriate CMS Service Leads for processing.

**Q: Where can I find information regarding Data Use Agreements?**

A: Refer to the [CMS Services](#) tab for general information regarding Data User Agreements and links to CMS and CCSQ Data & Analytics resources.

**Q: How do I map my DUA to the CCSQ Data & Analytics Centralized Data Repository (CDR) data catalog?**

A: Refer to the [CCSQ Data & Analytics > Data Resources > Mapping DUAs to the CDR](#) page for information on how to correctly map your DUA to the Centralized Data Repository (CDR).

## RESOURCES



### Resources

This section provides resources to assist CMS CORs, the ISG Contract Engagement team, and contractors in onboarding to or offboarding from QualityNet IT Services. Also see [Resources](#) on QualityNet Confluence.

#### **CMS Access**

*Most of the links referenced on this page require CMS credentials.*

#### **Contract Checklists**

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

**Table 5. Contract Checklists**

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

## QualityNet Security

QualityNet Security is a central repository that houses HCQIS policies, guidelines, and templates intended for existing or potential CCSQ contractors using QualityNet IT Services and/or HCQIS network resources.

The information is intended to guide contractors or potential bidders in meeting general CMS security requirements as well as providing associated processes to ensure compliance within the contract and while utilizing the CCSQ systems.

Refer to the [Security](#) tab on the QualityNet Communications Hub for the following information regarding QualityNet security:

- QualityNet Security Policy  
([https://qnetconfluence.cms.gov/display/QNS/QualityNet+Security#QualityNetSecurity-Security\\_Policy](https://qnetconfluence.cms.gov/display/QNS/QualityNet+Security#QualityNetSecurity-Security_Policy))
- Security Awareness and Training  
(<https://qnetconfluence.cms.gov/display/QNS/Security+Awareness+Training>)
- Security Point of Contact  
(<https://qnetconfluence.cms.gov/display/QNS/QualityNet+Security#QualityNetSecurity-SPOC>)
- Security Incident Response  
([https://qnetconfluence.cms.gov/display/QNS/QualityNet+Security#QualityNetSecurity-Incident\\_Response](https://qnetconfluence.cms.gov/display/QNS/QualityNet+Security#QualityNetSecurity-Incident_Response))

## Templates

This table provides templates for CMS COR use in support of their role and responsibilities in onboarding or offboarding contractors to QualityNet IT Services.

**Table 6. Templates**

| Template  | Description   |
|---|---|
| <a href="#">Contract Engagement Intake Form</a>   | This form starts the onboarding process when a contract’s period of performance begins. The CMS COR and New Contractor must complete an initial form to request the start of the contract engagement. Based on the information provided, the ISG Contract Engagement team determines if there is a need for QualityNet IT Services. Refer to the <a href="#">Procedures for Completing the Contract Engagement Intake Form</a> for more information as part of the <a href="#">Onboarding Process</a> . |
| <a href="#">Data, Infrastructure &amp; Security - Information Systems Group (ISG) Questionnaire</a> | The ISG Questionnaire aids 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 engagement timeline and deliverables.  |
| <a href="#">ISG Contract Closeout SOP</a>   | This document is the Standard Operating Procedure (SOP) for closing out an ISG contract.  |
| <a href="#">ISG Roles and Responsibilities Matrix</a>   | The purpose of this document is to identify the responsibilities for steps listed in Section 3 – Procedure Steps based on the required roles for completing the engagement and onboarding of New Contractors within ISG.  |
| <a href="#">ISG Transition Activities Project Schedule Template</a>                                 | The ISG Engagement Activities Project Schedule Template is a tool that can be customized. It aids the Engagement Lead in creating their engagement project schedule because it includes engagement activities, durations, dependencies, and resource names to ensure that all engagement activities can be completed by the engagement end date.  |



## Training & Manuals

This table provides links to training opportunities available to CMS CORs and Contractors.

**Table 7. Training & Manuals**

| Training & Manual Title   | Description   |
|---|---|
| <a href="https://www.cms.gov/cbt">RBT &amp; RoB Policy Updates: A Briefing for CORs (cms.gov/cbt)</a>     | Access the training under the RBT menu on the Manage Training Information page.   |
| <a href="#">National Initiative for Cybersecurity Education (NICE) Cybersecurity Workforce Framework.</a> | This publication serves as a fundamental reference resource to support a workforce capable of meeting an organization’s cybersecurity needs. It provides organizations with a common, consistent lexicon that categorizes and describes cyber security work.  |
| <a href="https://www.cms.gov/cbt">RBT &amp; RoB Policy Updates: A Briefing for CORs (cms.gov/cbt)</a>     | A specialized training titled RBT & RoB Policy Updates: A Briefing for CORs. All CORs are expected to take this training annually. Access the training under the RBT menu on the Manage Training Information page.  |
| <b>Role-Based Training (RBT)</b>  | 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.   |
| <b>Role-Based Training (RBT) Policy Implementation</b>  | For additional guidance on RBT policy implementation, refer to the Risk Management Handbook Chapter 2 Awareness and Training, dated 02/27/2019.   |
| <b>QualityNet User Guide</b><br><a href="https://www.qualitynet.org">https://www.qualitynet.org</a>       | The purpose of the Hospital Quality Reporting (HQR) 5.0 release is to support the existing Hospital Inpatient Quality Reporting (IQR), Inpatient Psychiatric Facility Quality Reporting (IPFQR), Hospital Outpatient Quality Reporting (OQR), Ambulatory Surgical Center Quality Reporting (ASCQR), and Prospective Payment System (PPS)-Exempt Cancer Hospital Quality Reporting (PCHQR) programs. This user guide provides the information necessary for IQR, OQR, and PCH hospitals and ASCs and IPFs to use the HQR 5.0 System Release. |