|  |  |
| --- | --- |
| Start Date |  |
| Primary onboarding contact name |  |
| Primary onboarding contact email |  |
| Primary onboarding contact phone |  |
| Time Zone |  |
| Company Name |  |
| Company Address |  |
| Company City, State, Zip |  |
| Company Tax ID |  |
| Program ID (ACOID) |  |
| Program (ACO, ACO Reach, PCF, DPC, CCM) |  |
| Quality Template (CMS WI, APP, PCF) |  |
| If PCF, clinic location names |  |
| Medicare Patient Assignment TypeProspective or Preliminary Prospective Attribution |  |
| ACO MS or 4i Portal Access | Add Kristine Gates gates@healthendeavors.com |
| SFTP Access Setup (send instructions) |  |
| Quick Report Permissions | Yes |
| Security Official(s)  | Person(s) with rights to add, remove and edit user accounts |
| **Full Name** |  |
| Title |  |
| Phone |  |
| Email |  |
| **Full Name** |  |
| Title |  |
| Phone  |  |
| Email |  |
| Billing Contact  | Person to receive invoices and account statements |
| Full Name |  |
| Title |  |
| Phone |  |
| Email |  |

**INTERNAL USE ONLY**

|  |  |
| --- | --- |
| Agreement Signed Date |  |
| BAA Signed and Submitted Date  |  |
| All Files In (Y/N) |  |
| Kickoff Call Date  |  |
| Training Scheduled (Y/N)  |  |
| Jira Project  |  |
| MFT Access (Y/N)  |  |

|  |  |
| --- | --- |
| Roles | * CCT Master Bronze
* CCT Master Gold
* CCT Master Silver
* CCT Tin Bronze
* CCT Tin Gold
* CCT Tin Silver
* Assign System Events (ADT Only)
* GPRO Access
* HEDIS Access
* MIPS – REDIRECT
* MIPS Access
* Population access – ACO
* Population Access – Commercial
* QPP Access
* Quality Measures Access
 |
| Quality Templates | * PCF
* ACO
 |
| Programs | * Accountable Care Organization (ACO)
* Primary Care First (PCF)
* Direct Contracting Entity (DCE)
* Data Point of Care (DPC)
* Commercial
* Medicaid
* Medicare Advantage
* Employer
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