|  |  |
| --- | --- |
| 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 Type  Prospective 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 |