APPENDIX D. SITE CHECKLISTS

Sites should follow a standard procedure to use NSSP's BioSense Platform and to onboard facilities to the BioSense Platform. These checklists will help you identify, learn about, and track required site activities.

The **New Site Onboarding Checklist** lists activities needed to onboard the site and prepare the site to onboard facilities.

New Site Onboarding Checklist		
Action Item	**Responsible Party**	**Additional Resources**
Complete site-level data use agreement (DUA) with the Association for State and Territorial Health Officials (ASTHO) and consider the CDC DUA	Site administrator	BioSense Platform Service Desk
Complete BioSense Onboarding Process Acknowledgment (BOPA)	Site administrator Site onboarding coordinator	
Define site roles and responsibilities	Site administrator Site onboarding coordinator	
Review training and resources	Site administrator Site onboarding coordinator	
Determine site onboarding support model	Site administrator Site onboarding coordinator	
Plan for data sharing and site-to-site access	Site administrator	
Develop facility recruitment plan	Site administrator Site onboarding coordinator	
Prioritize facilities	Site administrator Site onboarding coordinator	
Submit Master Facility Table (Excel spreadsheet template) to BioSense Platform Service Desk	Site administrator Site onboarding coordinator	BioSense Platform Service Desk
Submit Quarterly Facility Readiness Updates to BioSense Platform Service Desk	Site administrator Site onboarding coordinator	BioSense Platform Service Desk

The **Site Onboarding Checklist for Facilities** should be used for each new facility onboarding to the BioSense Platform.

Site Onboarding Checklist for Facilities		
Action Item	**Responsible Party**	**Additional Resources**
Manage site onboarding priority list	Site administrator Site onboarding coordinator	
Manage and submit updated site Master Facility Table Excel template to BioSense Platform Service Desk	Site administrator Site onboarding coordinator	
Complete downstream DUA with facilities	Site administrator Site onboarding coordinator	
Review facility's NIST HL7 validation results	Site administrator Site onboarding coordinator	NIST Compliance Tool
Engage site and facility for onboarding	Site administrator Site onboarding coordinator	
Create target dates for milestones	Site administrator Site onboarding coordinator	
Submit Master Facility Table template with planned facility onboarding dates to BioSense Platform Service Desk	Site administrator Site onboarding coordinator	BioSense Platform Service Desk
Review grant-based deadlines (if site is a grantee)	Site administrator Site onboarding coordinator	
Create SSH key pair	Site or facility technical engineer EHR data manager	
Create site administrator user account	Site administrator Site onboarding coordinator Onboarding team	
Upload valid production HL7 message	Site or facility technical engineer EHR data manager	
Configure HL7 Processing	Onboarding team	
Choose between SFTP and PHINMS for data exchange	Site administrator Site onboarding coordinator Site or facility technical engineer EHR data manager	

Develop filename convention	Site or facility technical engineer EHR data manager	
Request data validation through BioSense Platform Service Desk	Site administrator Site onboarding coordinator	
Create data validation results for site administrator	Onboarding team	
Assess facility data compliance results to meet NSSP-required minimums	Onboarding team	
Assess facility data compliance results to meet site-specified minimums (see Note)	Site administrator Site onboarding coordinator	
Ensure data does not have personally identifiable information (PII) and data elements are mapped correctly	Site administrator Site onboarding coordinator Facility technical engineer EHR data manager	
Monitor facility connections	Site or facility technical engineer EHR data manager	
Provide support for connection issues	Site or facility technical engineer EHR data manager	
Review data timeliness and quality	Site administrator	
Respond to data quality investigations and data quality improvement requests	Facility administrator Facility leadership Facility technical engineer	

Note: A site may have additional data compliance or quality standards than administered by the NSSP yet choose to accept NSSP's minimum data compliance guidelines. A site's level of involvement during the Validate phase will vary depending on the selection of onboarding support model.