

APPENDIX E. FACILITY ONBOARDING CHECKLIST

Specific activities must be completed before a facility can onboard to the BioSense Platform. Facilities may use the following checklist to track the completion of action items. Because some sites might have additional requirements, it's a good idea to always check with their site administrators to make sure you have a clear understanding of what is required.

Facility Onboarding Checklist		
Action Item	Responsible Party	Additional Resources
Complete Data Use Agreement (DUA) with site	Facility leadership Facility administrator	Request DUA from site administrator
Complete BioSense Onboarding Process Acknowledgment (BOPA); submit signed form to site	Facility administrator Facility technical engineer EHR data manager	
Define facility roles and responsibilities	Facility administrator Facility leadership Facility technical engineer EHR data manager	
Review training and resources	Facility administrator	
Develop HL7 messages	Facility technical engineer EHR data manager	
Complete NIST validation testing	Facility technical engineer EHR data manager	NIST Compliance Tool
Manage or submit updated site Master Facility Table Excel template to BioSense Platform Service Desk	Site administrator Site onboarding coordinator	
Submit HL7 test messages to NIST validation tool, and submit successful test results to site administrator	Facility administrator Facility technical engineer EHR data manager	NIST Compliance Tool
Review NIST HL7 validation results	Facility administrator Site administrator Site onboarding coordinator	NIST Compliance Tool
Engage site and facility for onboarding	Onboarding team	
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	
Create SSH key pair	Site or facility technical engineer EHR data manager	
Create site administrator user account	Onboarding team	
Configure processing	Onboarding team	
Upload valid production HL7 message	Site or facility technical engineer EHR data manager	
Choose between SFTP and PHINMS for data exchange	Site administrator Site onboarding coordinator Site or facility technical engineer EHR data manager	
Develop filename convention using NSSP guidelines	Site or facility technical engineer EHR data manager	
Request data validation through BioSense Platform Service Desk	Site administrator Site onboarding coordinator	BioSense Platform Service Desk
Download data validation results for site administrator	Site administrator Site onboarding coordinator	
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	
Fix HL7 issues and resubmit data as required	Facility technical engineer EHR data manager	
Ensure data does not have personally identifiable information (PII) and data elements are mapped correctly	Site administrator Site onboarding coordinator Site or Facility technical engineer EHR data manager	
Monitor facility connections	Facility administrator 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 or Facility technical engineer EHR data manager	
Respond to data quality investigations and data quality improvement requests	Facility administrator Facility leadership Facility technical engineer EHR data manager	

Note: A site may have more 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.