

Vendor Onboarding Checklist

Month 1:

- ☐ 1 Drafting of Policies and Procedures for Program.
- ☐ 2 Attendance of regularly scheduled meetings with HSA.
- ☐ 3 Initiation of securing staff for all required positions.
- ☐ 4 Training and onboarding of staff.
- ☐ 5 Development of Program forms.
- ☐ 6 Utilization of Agreement's Scope of Services in the creation and implementation of the Program.
- ☐ 7 Utilization of the Contractors Policy & Procedure manual.

Month 2:

- ☐ 1 Continued development of Program's Policies and Procedures.
- ☐ 2 Attendance of regularly scheduled meetings with HSA.
- ☐ 3 Fulfillment of all required staff positions.
- ☐ 4 Continued training and onboarding of staff, if applicable.
- ☐ 5 Continued development and utilization of Program forms.
- ☐ 6 Completion and submission of HSA required reporting for Month 1, if applicable.
- ☐ 7 Review of Program design to ensure alignment with the Agreement's Scope of Services.
- ☐ 8 Any additional support needed from HSA is identified and declared.

Month 3:

- ☐ 1 Continued development and revision of Program's Policies and Procedures.
- ☐ 2 Attendance of regularly scheduled meetings with HSA.
- ☐ 3 Staff roles are clearly defined and reflected in the Program's Policies and Procedures.
- ☐ 4 Staff training is conducted as needed.
- ☐ 5 Program forms are finalized and reflected in the Program's Policies and Procedures.
- ☐ 6 Completion and submission of HSA required reporting for Month 2, if applicable.
- ☐ 7 Refinement of Program design to ensure alignment with the Agreement's Scope of Services.
- ☐ 8 Any additional support needed from HSA is identified and declared.

Month 4:

- ☐ 1 Program's Policies and Procedures draft is complete and submitted to HSA for review.
- ☐ 2 Regularly scheduled meetings with HSA are reviewed and may become less frequent.
- ☐ 3 Staff are executing roles with minimized management involvement.
- ☐ 4 Staff training is conducted as needed.
- ☐ 5 Program forms are fully implemented.
- ☐ 6 Completion and submission of HSA required reporting for Month 3 or First Quarter, if applicable.
- ☐ 7 Program design is aligned to meet performance requirements within the Agreement's Scope of Services.

Month 5:

- ☐ 1 Program's Policies and Procedures document is finalized.
- ☐ 2 Attendance of scheduled meetings with HSA.
- ☐ 3 Staff are executing roles with minimal management involvement.
- ☐ 4 Staff training is conducted as needed.
- ☐ 5 Program forms are used consistently.
- ☐ 6 Completion and submission of HSA required reporting is ongoing, if applicable.
- ☐ 7 Program design actively fulfills performance requirements within the Agreement's Scope of Services.

Month 6:		
☐	1	Attendance of the 6-Month Implementation meeting with HSA.
☐	2	Program's Policies and Procedures document is shared with HSA.
☐	3	Defined roles of all staff are shared with HSA.
☐	4	Program forms are shared with HSA.
☐	5	Attendance of scheduled meetings with HSA.
Months 7 - 12:		
☐	1	Consistent performance of Agreement's Scope of Services.
☐	2	Consistent application of Program's Policies and Procedures.
☐	3	Operates Program with minimal HSA oversight.
☐	4	Attendance of scheduled meetings with HSA.
Following Year 1:		
☐	1	Participation in HSA Fiscal Monitoring.
☐	2	Participation in HSA Programmatic Monitoring.

Vendor Expectations	
1	Adherence to the Contractors Policy and Procedure manual.
2	Adherence to CFR 200 practices.
3	Performance of Scope of Services defined within the Agreement.
4	Timely submission of reports as described in the Agreement.
5	Timely submission of invoices/IBERS as described in the Agreement.
6	Timely supply of documentation as requested by HSA.
7	Timely response to email, phone, and other communications.
8	Attendance to HSA initiated meetings.
9	Completion of Program's Policies and Procedures within 6 months of Program inception.
10	Familiarity of HSA's Contractor Resources Webpage