|  |  |  |  |
| --- | --- | --- | --- |
| # | Implementation Step | Details | Completed Date |
| 1 | Kick-Off | Attend the CBI Implementation kick-off teleconference. This will provide an overview of CBI, the implementation process, and is a chance to address any questions/concerns which may arise. | Click here to enter a date. |
| 2 | Assign Contacts | Executive Sponsor: Click here to enter text.Primary Contact: Click here to enter text.Privacy Officer: Click here to enter text. | Click here to enter a date. |
| 3a | Electronic Service Provider Agreement (ESPA) | Please sign and return the ESPA, which must be completed before an HSP can go live on CBI. The ESPA and signing guide are available on the CBI website, or you can request them from cbisupport@reconnect.on.ca | Click here to enter a date. |
| 3b | System Testing | Please verify with the CBI team that your vendor is validated on the CBI system. HSPs are then asked to request testing credentials using the HSP Testing Credentials Request Form. Once you have received your testing credentials via email, please complete all the steps in the HSP Testing and Validation Guide. Your vendor may also have additional material and can provide assistance with testing if necessary. | Click here to enter a date. |
| 4 | Validation | Once you have completed the test uploads, please contact the CBI team to verify that everything was successful. Upon successful completion, live credentials will be issued which will allows actual records to be uploaded to the live CBI environment. Please work with your vendor to switch from the testing environment to the live environment, enter these credentials, set up automatic uploads, and “Go Live”. | Click here to enter a date. |
| 5 | Confirm Live Status | After “going live” on the CBI production environment, please contact the CBI team to verify that they are receiving your live uploads. | Click here to enter a date. |
| 6 | Ongoing Monitoring | HSPs will have access to an Administrator User Interface within the CBI component of their Client Management System so they can monitor uploads for submission errors. Please develop a regular schedule to check this log and resolve any of these errors. | Click here to enter a date. |