# MyCSF User Guide

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Browser Support:

MyCSF supports the following browsers:

Internet Explorer (IE 11 users may experience difficulties and is not recommended)
Firefox
Safari (Safari is not currently supported however it is slated to be provisioned shortly.)

*Pop-Up Blocker will need to be disabled for MyCSF.*

Login

To access MyCSF, proceed to https://portal.hitrustalliance.net and enter the username/password that you registered with. If you do not have an account, click the link adjacent to “No Account?” and we will provision an account on your behalf. (Note: The provisioning can take up to one business day)
MyCSF Library:

Click the *MyCSF Library* tab to view the HITRUST Common Security Framework (CSF). The CSF is a comprehensive and prescriptive framework that can be scaled and tailored based on an organization’s type, size and complexity. This library will include the most interactive and up-to-date source for the CSF.
CSF Library Searches

Located in the *MyCSF Library* tab is a search field. While highlighting the HITRUST CSF Library, you may query the library for keywords.

Search the CSF for specific content by using the Search Field

Need Help Scoping an Assessment?

If you are unsure about the scoping process, refer to the following documents available on the HITRUST Alliance website (www.HITRUSTAlliance.net). It provides broader guidance on planning for an assessment including system identification and grouping:

- Planning and Leveraging the HITRUST CSF
- HITRUST CSF Assessment Methodology
- MyCSF vs. GRC Tool
- HITRUST Executive Summary and Introduction
MyCSF Assessments

This tab is home to all MyCSF Assessments. Click on the MyCSF Assessments tab to see your current list of Assessment objects.

To open an object, highlight it and double click or click the Open button.

Search by status, type, entity, by altering the drop down. Resultingly, this will group the objects into the appropriate category as selected by the user.

Note: The number of Objects available to create is defined by your organization’s purchased Subscription Tier. See the MyCSF Pricing Sheet for more information.

Administrative Details and Factors

After opening your object from the MyCSF Assessment Tab, you will be presented with the page below.

Start Here

Click the Administrative Details & Factors link to begin scoping the assessment object.
Scoping an Assessment Object

Begin scoping an object by inputting data into the Organization Information, Assessment Options, Factors, Systems, and Facilities Tabs. Required fields are denoted by a red bar to the left of the field.

Organization Information Tab

Under this tab, Contact Information, Organizational Profile, and Environment are defined.

Factors Tab

Risk factors are input through the Factors tab. Inputs into these fields determine which controls and what implementation levels will be included in your Baseline Questionnaire.
Use this screen to build a list of systems that are being considered during the overall assessment for the organization. This should be leveraged as a reference to which systems are contained in the scope current assessment object. This does not prohibit you from assessing these systems individually in the future.

Logical application systems should be documented. Specific server, device names, etc. are not required.

Facilities Tab

Use this section to build a list of Facilities that are being considered during the assessment.
IMPORTANT: Adding a System or Facility does NOT create new assessments to be completed. To assess each facility and/or system separately, individual objects will have to be utilized for each. This screen is only for building simple lists of systems and included in the scope of the assessment and assessed as a whole.

(Check out the MyCSF Education Video Configuring an Organization Object in the MyCSF Video Library)
Generate/Update the Baseline Assessment

*Pop-Up Blocker will need to be disabled for these steps!*

Once the Baseline Assessment Scoping information is submitted, the following dialogue boxes will appear.

Click **OK** or **Cancel** as appropriate.

---

<table>
<thead>
<tr>
<th>Administrative and Scoping Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organization Information</strong></td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Entity Type</strong></td>
<td></td>
</tr>
<tr>
<td>BioTech Company</td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Organizational Factors</strong></td>
<td></td>
</tr>
<tr>
<td>Number of Covered Lives</td>
<td></td>
</tr>
<tr>
<td>Does Not Apply</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Licensed Beds</td>
<td></td>
</tr>
<tr>
<td>Does Not Apply</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Visits per year</td>
<td></td>
</tr>
<tr>
<td>Does Not Apply</td>
<td></td>
</tr>
</tbody>
</table>
IMPORTANT: If you are simply updating the risk factors for an existing baseline assessment, the questionnaire will be updated and no information will be lost. For the requirements that no longer apply to the scope originally submitted, they will be marked No Longer In Scope.

Note: If you answered Yes to creating a Detailed Assessment, you will be presented with additional dialogue boxes.

Completing the Baseline Assessment

How to Answer Questions

To view the Baseline Questions, double click the Object from the MyCSF Assessments tab.

Click the Baseline Assessment link.

Click the + to expand a Domain to access the questions.

Double-click the requirement statement to start providing the maturity inputs.
Baseline Response Statuses:

- **Not Started**  None of the Maturity Assessment Answers have been provided.
- **Incomplete**   Some but not all of the Maturity Assessment Answers have been provided.
- **Complete**     All of the Maturity Assessment Answers have been provided.

Easily navigate to the next requirement by clicking the **Right Arrow**. Your answers and comments will be saved.

Click **Save & Close** when you wish return to the Baseline Assessment.

Use the Comments field to contain documents and names of documents to maintain access control, record why organization is not fully compliant and store information that support answers.

Click the **Refresh** button if the status of the questions you answered are not updated automatically.
Setting Not Applicable

Marking a requirement “Not Applicable” can be achieved in one simple step. Located on the *Baseline Requirement* tab is a field labeled *Is this Control Applicable?* By default, it will be set to *Yes*, however, if this is a question that does not apply to your assessment at hand, feel free to modify this to read *No*. As a result, this requirement will not be counted in any assessment scores. While you won’t be required to enter any maturity values, please provide justification in the *Your Comments* field.

![Image of a control information and maturity assessment section]

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**IMPORTANT:** Do NOT select *Not Applicable* on any of the maturity inputs IF you have not set the requirement as *Not Applicable* on the aforementioned attribute. This will score that portion of the assessment at a zero.

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Since you have selected *Not Applicable*, you must provide justification in the *Your Comments* field.
Illustrative Procedures

The Illustrative Procedures tab is another approach offered to answer requirements. The benefit of answering in this tab is that for every requirement, the Illustrative Procedures provide guidance on how to ensure the organization has implemented the requirement correctly for the 5 required Maturity Levels (Policy, Procedure, Implemented, Tested, and Managed).

Example: The Related CSF Control is 00.a Information Security Management Program, Level 1

Illustrative Procedure Policy:
Obtain and examine information security policies to determine if an information protection program has been established, includes scope, goals, governance, and roles/responsibilities, and is based on an industry-standard security framework (e.g., HITRUST, NIST, ISO).

(Check out the MyCSF Education Video Answering Baseline Questions at MyCSF Video Library)
Diary

The Diary Tab allows you to make notes on each individual requirement while maintaining a log of the entries. This function is useful to centralize communication with those in your organization or a third party while undergoing a Validated Baseline Assessment.

- This feature is at the question level, so open your baseline assessment.
- Double a click question within your assessment.
- Choose the Diary Tab.

Assigning Requirements

Standard users of the tool can assign specific assessment questions to individuals with the subject matter expertise needed to respond. To assign a user to a requirement:

- Click the MyCSF Assessments tab.
- Double click or highlight the assessment and click the Open button.
- Click the Baseline Assessment link.

Comments are then added to the Information/Comments Diary field, after clicking Add Entry.

Click the Save &Close button once all entries are made to ensure they are saved.

(See the MyCSF Education Video Using the Diary at MyCSF Video Library)
1. Expand a Domain

2. Highlight the question to be assigned.

3. Click the Assign button

4. Click Add.

5. Type the search criteria. Search by username, name or email address by checking one of the Search Keys.

6. Click Validate button.
6. When Assignee is found, click **OK**.

8. Returns to the Permission Assignment window, with the assignee highlighted. Check **Customer Respondent** role.

9. Click **Apply**.
Tracking an Assessment

Assessment Home Page

While this serves as the Home Page for your assessment, it also equipped to display your assessment progress at a glance with the Circle Chart (pictured second below). The chart updates in real-time as you advance through your assessment.

1. Click the MyCSF Assessments tab
2. Ensure Baseline Assessments is selected
3. Double-click the desired object
Visual profile

The Visual Profile is designed to provide a CSF profile of the controls and implementation levels for an assessed object. It is updated every time you make an adjustment to your Organizational, System or Regulatory factors defined in scoping your object.

Profile Color Coding:

- **Gold** represents controls required for CSF certification.
- **Red** indicates the level of each control to implement.

The visual profile can be accessed in two locations in MyCSF:

1. While entering the assessment risk factors under the **Administrative Details & Factors** link.
2. On the MyCSF Visual Profile tab.

(Check out the MyCSF Education Video The Visual Profile at MyCSF Video Library)

Response Navigator

The Response Navigator tab permits quick identification of Baseline Requirements and allows status updates of the questions.
(Checkout the MyCSF Education Video Response Navigator Tab at MyCSF Video Library)

Dashboards

The Dashboards create an at-a-glance snapshot using graphics to how the assessment is progressing. You always know where you stand with the assessment to provide a quick update. To access, click the Dashboards tab and, subsequently, the assessment object you are wishing to view.
Uploading Documents to MyCSF

The Assessor and Customer links provide a way to securely upload documents to HITRUST.

- For Assessors this may be additional documents to support their 3rd party assessment.
- For Customers this would be their participation agreement, management rep. letter, etc.
- Note: The rep. letter is required to be submitted on letterhead as a signed PDF.

Click either the Assessor or Customer Document link dependent on your role.
1. Click **File Attachments** link.

2. Browse to your file.

3. Click the **Attach This File** Button. **Save**.
Submitting an Assessment

Whether submitting a Self-Assessment or Validation by a Third Party can be achieved in one simple step. Your baseline questionnaire has to be completed prior to starting this process:

**Mandatory:** Your rep. letter must be uploaded before review of the submitted assessment will begin. Must be on letterhead, signed and in PDF format.

Submitting the Assessment

*Note: It is a 4-6 week turn around period for processing a submitted report. Please plan accordingly.*

1. Click *MyCSF Assessments* Tab
2. Select the Object for which you are submitting an assessment. Open the Object by either double clicking it or click the Open button.

3. The Assessment will open. Scroll down to the **Details/Workflow** section.

4. Click the **Action** button. Select **Submit Baseline Assessment**. Note: Once submitted, it disables the client’s ability to make changes or additions.
Downloading Your CSF Assessment Report

Once you receive HITRUST notification that the report is ready you can download your CSF assessment report. There is a link embedded at the end of the report notification that will bypass the following steps.

1. From the Assessment Homepage, click the Baseline Reports link.

2. Double click the report marked “Report Completed”.

![Assessment Homepage screenshot](image1.png)

![Baseline Reports screenshot](image2.png)
3. Click the Report Delivery Tab. Click the file attachment within the tab.

4. Click the link to download your report.
Adding an Object

**ONLY the Account Administrator at an organization** or an Assessor have the ability to add an object.

*If your organization has a Basic MyCSF subscription or you have only purchased a Self-Assessment report, then no additional objects can be added to the already existing object. To obtain additional objects contact Sales@HitrustAlliance.net.

**How to Add an Object**

*Pop-Up Blocker will need to be disabled for these steps!*

To add a new **Object**, click the **Add** button. Choose **Object** from the list.

The **Create a New Object Window** will appear next.

1. Type in the **Object Name**.
2. The Object Type should **ALWAYS** be set to **Assessment**.

3. After saving your choices, you will be returned to the *MyCSF Assessment* tab and the new object will be displayed in the **Object Name** list.

You will receive this message if you are attempting to create more objects than allotted by your Subscription Tier. Refer to your Customer Lead or the HITRUST Pricing Sheet for more information.
Generate Baseline Assessment Report

- Click the Reporting Tab (Only available to Professional, Corporate, Enterprise, and Performance customers)
- Click the link for the type of report you wish to generate (Note: The CAP Report is only available after Correct Action Plan steps have been entered into the Baseline Assessment)
- Click Preview button

Reporting results are generated in a PDF and Excel format and can be exported only in these two formats at this time.
Example of a baseline assessment report.

<table>
<thead>
<tr>
<th>Related CSF Control</th>
<th>Baseline Requirement Statement</th>
<th>Your Maturity Assessment</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSF 6.1 Information Security Management Program</td>
<td>The organization has a formal information protection program based on an accepted industry framework that is reviewed and updated as needed.</td>
<td>Policy: 100% Process: 100% Implemented: 100% Measured: 100% Managed: 100%</td>
<td></td>
</tr>
<tr>
<td>Related CSF Control</td>
<td>Baseline Requirement Statement</td>
<td>Your Maturity Assessment</td>
<td>Comments</td>
</tr>
<tr>
<td>CSF 6.2 Roles and Responsibilities</td>
<td>User security roles and responsibilities are clearly defined and communicated.</td>
<td>Policy: 100% Process: 100% Implemented: 100% Measured: 100% Managed: 100%</td>
<td></td>
</tr>
<tr>
<td>Related CSF Control</td>
<td>Baseline Requirement Statement</td>
<td>Your Maturity Assessment</td>
<td>Comments</td>
</tr>
</tbody>
</table>
Changing Your Password

Once you are logged into the portal, at the landing page, click **Change Password**.

You will arrive at the User Profile Screen.

Click **here** to go back to the portal.
Type in your new password.  
Re-Enter the same password.

Password format must be between 8-20 characters and contain at least one uppercase and lowercase letter, number and special character.

Click OK then Close.
Configuring Password Reset Questions

Once you are logged into the HITRUST portal, on the landing page, click **Change Password**.

Check the box next to the security questions of your choice and type in the corresponding answer. (We recommend answering at least 3 of the 5 questions.)

- Click **Save** to retain your answers.
- Click **Close** to return to the User Profile Screen.
Resetting Your Password

At the HITRUST Portal log in page, click the ‘Forgot your password’ option.

**Note**: you will not be able to use this feature until your security questions are set up in the portal.

Type in your user id (email address).

Answer the security question and click OK. You will be sent a temporary password that you will be required to modify on login.