

MyCSF 2.0

1 — Last update: Jun 30, 2021

HITRUST

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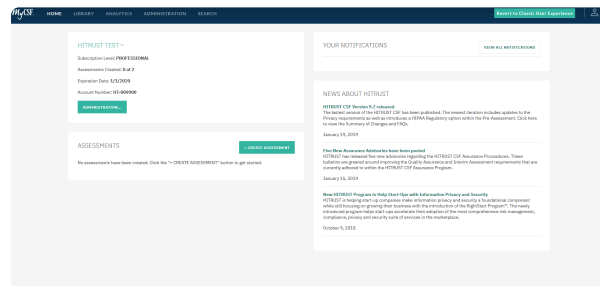
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1. MyCSF Application

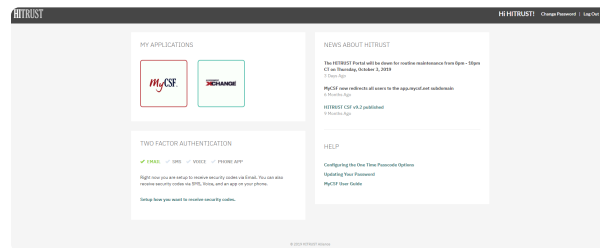
MyCSF is a full-featured Assessment Application that streamlines the compliance and risk management process. Simplistic in design, the tool efficiently helps manage all of your HITRUST CSF Assessments and Implementations.



Homepage of MyCSF

2. HITRUST Portal

This topic will instruct you on how to properly login to the HITRUST Portal, setup and manage Two Factor Authentication, change and/or reset a Password, and access the MyCSF and/or Assessment XCHANGE Application(s).



HITRUST Portal

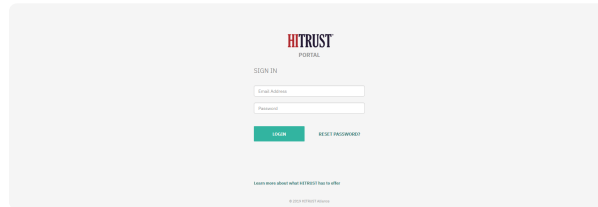
Sub-Topics

- [Logging in to the HITRUST Portal](#)
- [Configuring Two Factor Authentication](#)
- [Changing MyCSF Password](#)
- [Resetting MyCSF Password](#)

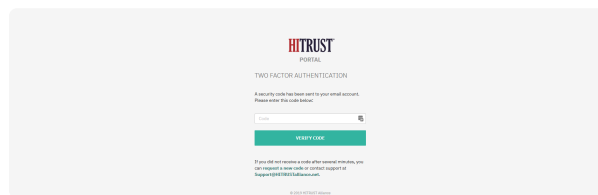
2.1. Logging in to the HITRUST Portal

Follow the steps below on how to login to the HITRUST Portal:

1. Using an Internet Browser, go to the web address <https://portal.mycsf.net>. A page will load that requires you to enter your Email Address and Password. Once entered, click the 'Login' button.
2. Depending on how your Two-Factor Authentication is setup, you will be sent a One-Time Passcode (OTP). Enter the 6-digit code you receive and click the 'Verify Code' button.

The screenshot shows the HITRUST Portal login interface. At the top is the HITRUST logo. Below it, the text "SIGN IN" is centered. There are two input fields: "Email Address" and "Password". Below the "Password" field is a green "LOGIN" button and a link that says "RESET PASSWORD". At the bottom, there is a small link that says "Learn more about what HITRUST has to offer" and a copyright notice "© 2022 HITRUST All Rights Reserved".

Login to HITRUST Portal

The screenshot shows the HITRUST Portal Two-Factor Authentication page. At the top is the HITRUST logo. Below it, the text "TWO FACTOR AUTHENTICATION" is centered. A message states: "A security code has been sent to your email account. Please enter the code below:". There is a single input field for the code and a green "VERIFY CODE" button. At the bottom, there is a small link that says "If you did not receive a code after several minutes, you can request a new code or contact support at support@hitrust.com" and a copyright notice "© 2022 HITRUST All Rights Reserved".

Verify Two-Factor Authentication

2.1.1. First Login and Authentication

If this is your first-time logging into the HITRUST Portal, follow the steps below to locate and change the temporary password associated with your MyCSF Account.

1. Locate the email with the subject line: "HITRUST Login Registration – Account Lead Created" from sender: no-reply2@mail.mycsf.net. Found near the bottom of the email's body, is a string beginning with "Your temporary password for the HITRUST Portal is:" The series of characters that succeeds this string will serve as your temporary password.
2. Using an Internet Browser, go to the web address <https://portal.mycsf.net>. A page will load that requires you to enter your Email Address and Temporary Password. Once entered, click the 'Login' button
3. If the right credentials were entered, you will be prompted to change your password. Enter your desired password twice and click the 'Change Password' button. Please note that the password will have to meet the policy outlined below.
4. You will be emailed a One-Time Passcode (OTP). Enter the 6-digit code you receive and click the 'Verify Code' button.

Hello HITRUST Lead,

You have been registered for access to MyCSF as an Account Lead. Account Leads are authorized to initially add new users and assessment objects in the MyCSF Administrator's Tool. Your current subscription allows:

Users: 30
Objects: 30

For information regarding the Administrator's Tool, please read the MyCSF Administrator's Tool Guide found at <http://hitrustalliance.net/mycsf-user-guide/2/en/notes/mycsf-guide>

Note: An assessment object will need to be created before you can initiate a CSF assessment.

To access the MyCSF Administrator's Tool or MyCSF Portal, please click the appropriately labeled links below:

MyCSF Administrator's Tool: <https://portal.mycsf.net/admintool/>

MyCSF Portal: <https://portal.mycsf.net/>

Your temporary password for the MyCSF Portal is: 0a29d03

You will be prompted to change this password on your first successful authentication.

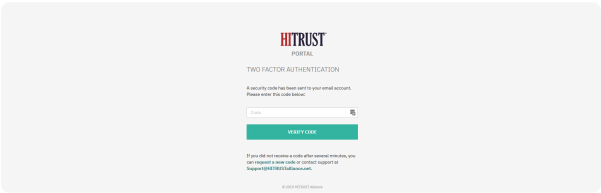
If you are in need of assistance, please contact us at support@hitrustalliance.net

Regards,
The HITRUST Team

HITRUST Welcome Email

Login to HITRUST Portal

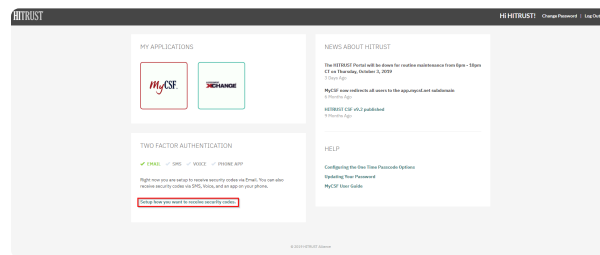
Change Password



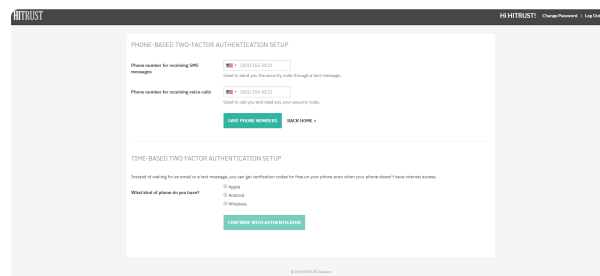
Verify Two-Factor Authentication

2.2. Configuring Two Factor Authentication

The HITRUST Portal supports the use of SMTP, SMS, Phone Call, and Time-Based Authenticator Apps to receive the One Time Passcodes (OTP) necessary to finish the log-in process. By default, all accounts are automatically provisioned with the SMTP option active. If you would prefer that the HITRUST Portal send the OTP in different fashion, click the “Setup how you want to receive security codes” link on the HITRUST Portal landing page.



Setup how you want to receive security codes



Two-Factor Authentication Setup

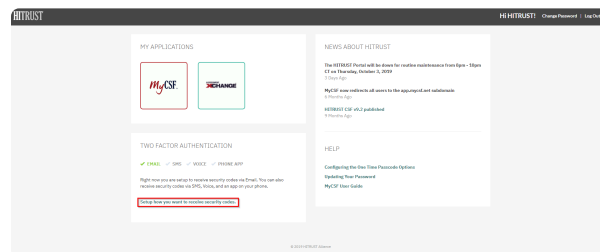
Subtopics

- [Phone-Based Two-Factor Authentication Setup](#)
- [Time-Based Two Factor Authentication Setup](#)

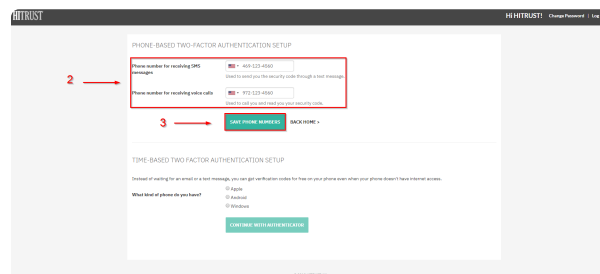
2.2.1. Phone-Based Two-Factor Authentication Setup

After successfully authenticating to the HITRUST Portal, you will be directed to the HITRUST Portal Landing page. Follow the steps below on how to properly configure SMS and Voice two factor authentication.

1. From the HITRUST Portal, click the link **“Setup how you want to receive security codes”**.
2. Enter a phone number for receiving SMS messages and/or voice calls.
3. Lastly, click the ‘Save Phone Numbers’ button.



Setup how you want to receive security codes

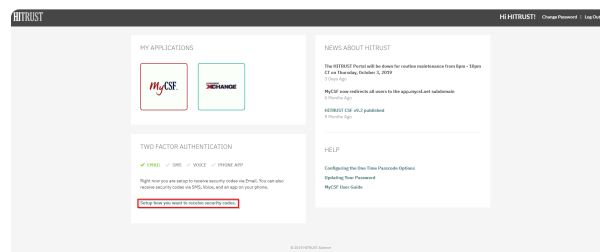


Phone-Based Two Factor Authentication Setup

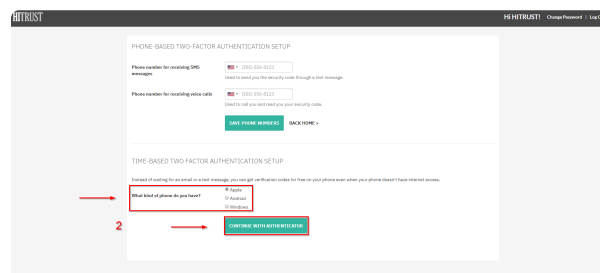
2.2.2. Time-Based Two Factor Authentication Setup

After successfully authenticating to the HITRUST Portal, you will be directed to the HITRUST Portal Landing page. Follow the steps below on how to properly configure time-based two factor authentication.

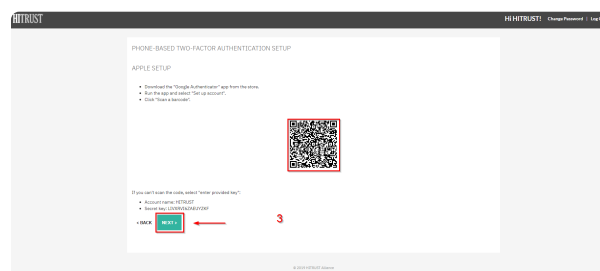
1. From the HITRUST Portal, click the link **“Setup how you want to receive security codes”**.
2. Select what kind of mobile device you have and click the ‘Continue With Authentication’ button.
3. From your mobile device, download any time-based authenticator app (e.g. Google Authenticator, Authy) app from the app store and set up your account. Once configured, scan the barcode and click the ‘Next’ button.
4. To ensure this was configured properly, enter the 6-digit code from the authenticator app and click the ‘Verify’ button.



Setup how you want to receive security codes



Time-Based Two Factor Authentication Setup



Scan Barcode

PHONE-BASED TWO-FACTOR AUTHENTICATION SETUP

TEST THE CODE

Enter the 6-digit code from the app

123456

BACK VERIFY

4

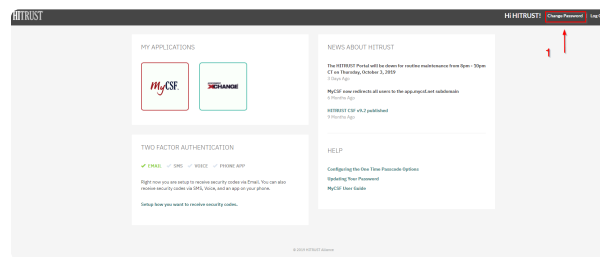
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Test the 6-digit code

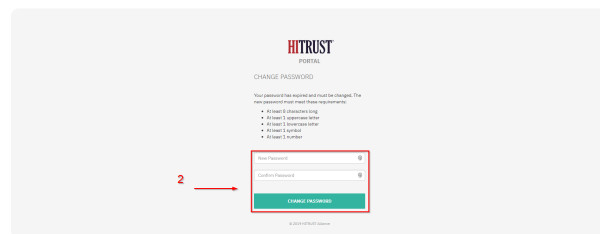
2.3. Changing MyCSF Password

If you wish to change your MyCSF password, please follow the steps below:

1. From the HITRUST Portal, click the 'Change Password' link on the top right corner.
2. Enter your desired password twice and click the 'Change Password' button. Please note that the password will have to meet the policy displayed.



Change Password Link

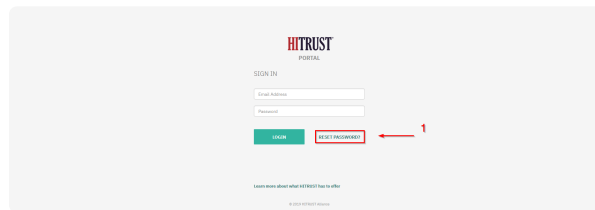


Change Password

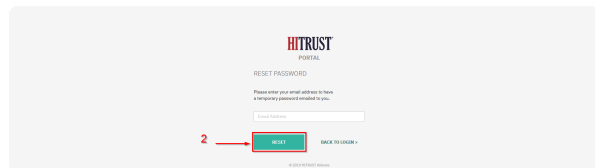
2.4. Resetting MyCSF Password

If you have forgotten your MyCSF password, please follow the steps below:

1. From the HITRUST Portal, click the 'Reset Password' link adjacent to the 'Login' button.
2. Enter your email address associated to your MyCSF Account and click the 'Reset' button.
3. Locate the email with the subject line: "HITRUST Login Registration – Password Reset" from sender: no-reply2@mail.mycsf.net. Within the body of the email is a string beginning with "Your temporary password is:" The series of characters that succeeds this string will serve as your temporary password.
4. Go back to the HITRUST Portal Homepage and enter your email address and temporary password. Once entered, click the 'Login' button.
5. If the right credentials were entered, you will be prompted to change your password



Reset Password Link



Enter Email Address

HITRUST Login Registration - Password Reset Inbox X

no-reply2@mail.mycsf.net

to me ▾

Dear [\[Your Name\]](#),

Your password has been reset. Your temporary password is: a6in4axB

Please click on the link below to change your password

<https://v2.mycsf.net/>

If you did not request this, please contact your administrator immediately.

Regards,
The HITRUST Team

Password Reset Email

3. Administration

The Administration page is where you manage your Account(s). If you are an Account Administrator for one or multiple accounts, this is where you can access each account. If you are an Account Administrator for one account, then you will be directed to your Subscriber's Management page. Topics in 'Administration' include: Subscriber and People Management as well as fetching account information.



Note: Standard Users will not have access to the MyCSF Administration page.

Subtopics

- [Subscriber Management](#)
- [People Management](#)

3.1. Subscriber Management

Depending on the Subscription Level access you have to MyCSF, the Subscriber Management page, is where you can manage and access your account's 'People', 'API Users', 'Custom Security Roles', 'Assessments', 'Links to HAX', and 'IP Whitelist'.

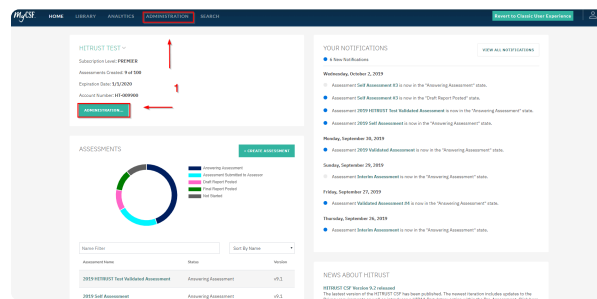
Subtopics

- [Adding a New Person](#)
- [Adding a New API User](#)
- [Adding a New Custom Role](#)
- [Setting IP Restrictions](#)

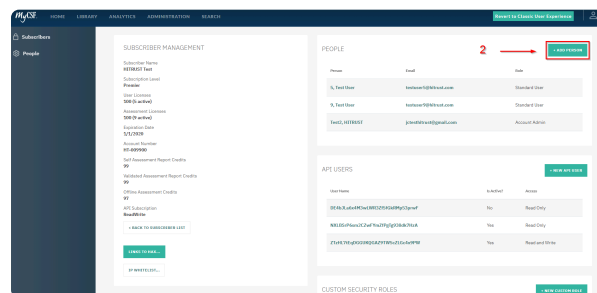
3.1.1. Adding a New Person

If you are wishing to add a new person to your MyCSF Account, please follow the steps below:

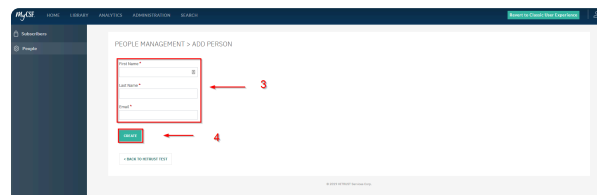
1. From the Homepage, click the 'Administration' button at the top Menu bar or below your Subscription Information.
2. From the Subscriber Management page, click the '+ Add Person' button on the 'People' table.
3. Enter the information for 'First Name', 'Last Name', and 'Email'.
4. Lastly, click the 'Create' button to save the new person. This newly created account will be emailed details to help get them started with MyCSF.



Administration Button



Add Person

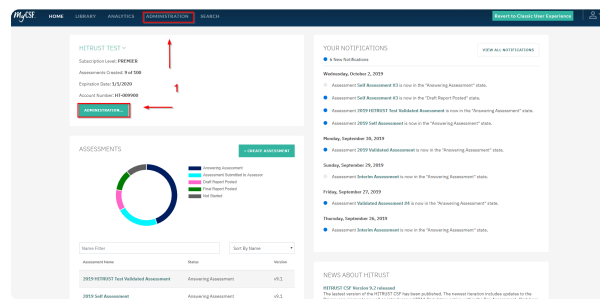


Create Person

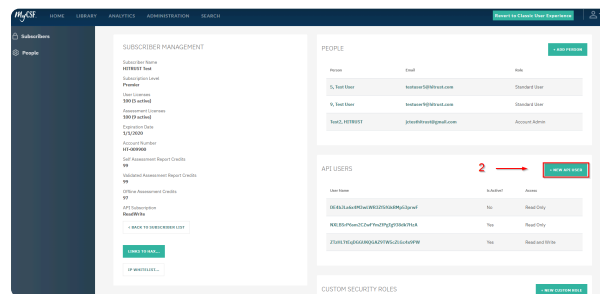
3.1.2. Adding a New API User

If you are wishing to add a new API User to your MyCSF Account, please follow the steps below:

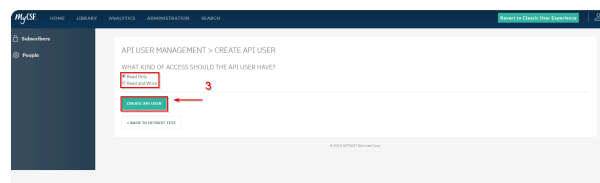
1. From the Homepage, click the 'Administration' button at the top Menu bar or below your Subscription Information.
2. From the Subscriber Management page, click the '+ Add New API User' button on the 'API Users' table.
3. Select the level of access the new API User should have. Click the 'Create API User' button.
4. A Username and API key will be generated and displayed on your screen. Save these values as they are used in your calls to the MyCSF API. Please note, the API Key will not be retrievable if it is lost. Ensure that you have it documented somewhere securely.



Administration Button



Add API User



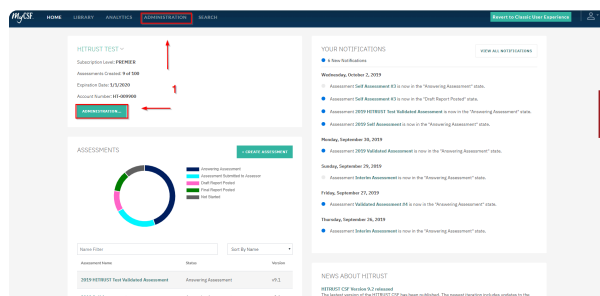
Create API User



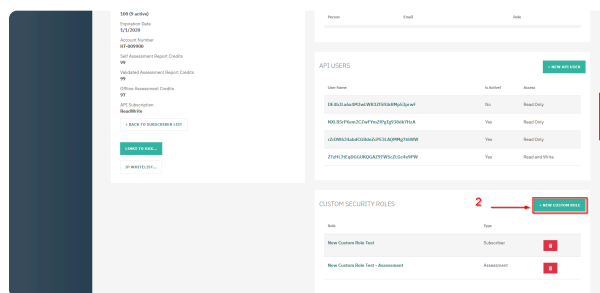
3.1.3. Adding a New Custom Role

If you have a Corporate Level Subscription or above and you are wishing to add a new custom role to your MyCSF Account, please follow the steps below:

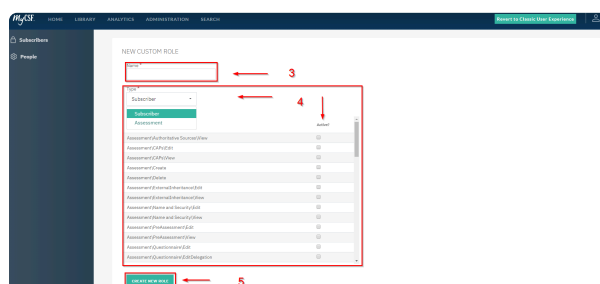
1. From the Homepage, click the 'Administration' button at the top Menu bar or below your Subscription Information.
2. From the Subscriber Management page, click the '+ Add New Custom Role' button.
3. Enter a 'Name' of the new custom role.
4. Select the 'Type' of role and the 'Permissions' this role should have. Note: Subscriber permissions will enable the configured access across all your Account's Assessments.
5. Lastly, click the 'Create New Role' button. This will then be assignable either within the Assessment or the Subscriber Administration.



Administration Button



New Custom Role



Create New Role

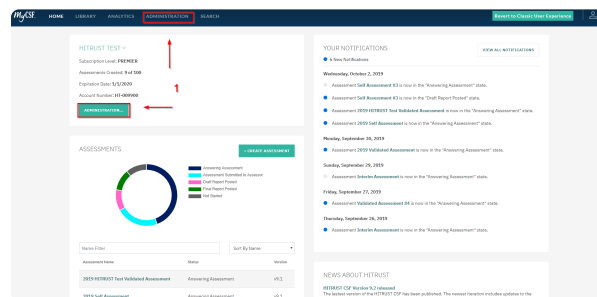


This feature is only available to Corporate and Premier Subscribers

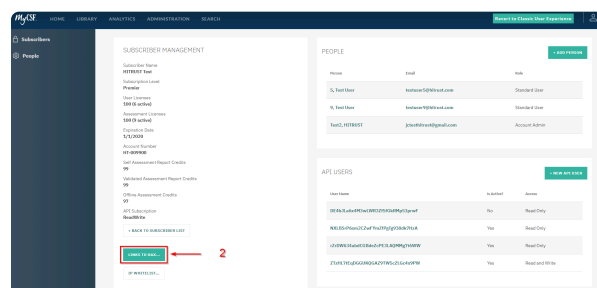
3.1.4. Setting IP Restrictions

The IP Whitelist can be used to allow an Organization to specify a permitted range of IP Addresses that can be used to access your Organization's information. To enable IP restrictions, follow the steps below:

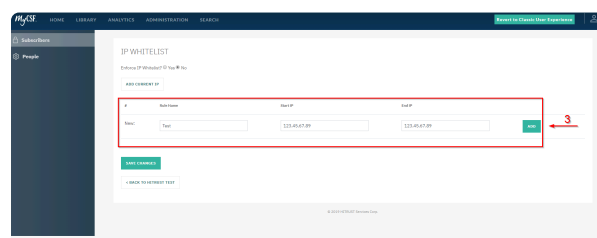
1. From the Homepage, click the 'Administration' button at the top Menu bar or below your Subscription Information.
2. Towards the bottom of your Organization's Account, click the 'IP Whitelist' button.
3. Enter a 'Rule Name' and a Start and End of the IP range desired, once entered, click the 'Add' button.
4. Check the 'Enforce IP Whitelist?', then 'Save Changes'.



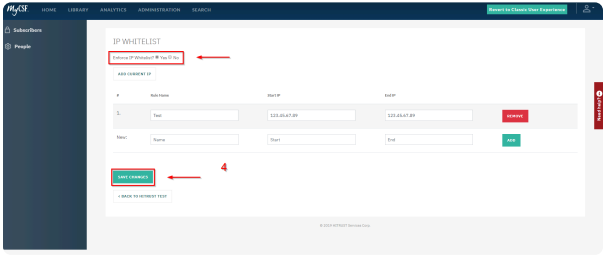
Administration Button



IP Whitelist



Adding IP Address



Enforcing IP Whitelist

3.2. People Management

If you are an Account Administrator within your Organization, you have the ability to manage people's access as well as modify their Assessment permissions. If you are wishing to elevate or decrease a user's Administrative rights, [click here for instructions](#). Or, [click here for instructions on updating a user's Assessment Role](#).

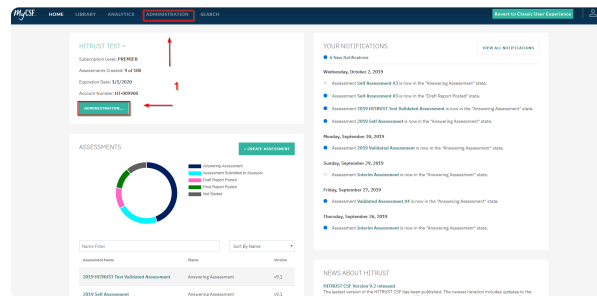
Subtopics

- [Managing Administrative Roles](#)
- [Controlling Assessment Roles](#)

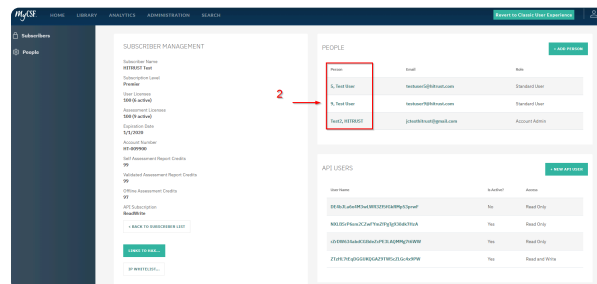
3.2.1. Managing Administrative Roles

Follow the instructions below to manage a user's Administrative Role.

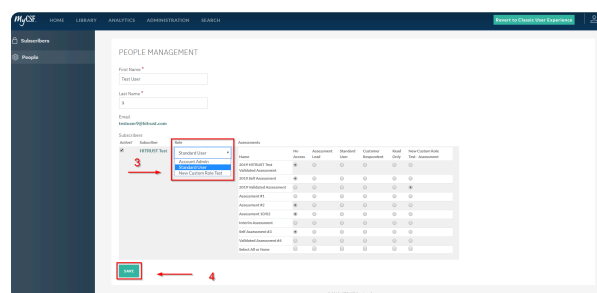
1. From the Homepage, click the 'Administration' button at the top Menu bar or below your Subscription Information.
2. Click on the name you wish to update.
3. From the People Management page, select a 'Role' to elevate or decrease their Administrative rights.
4. Lastly, click the 'Save' button.



Administration Button



Subscriber Management

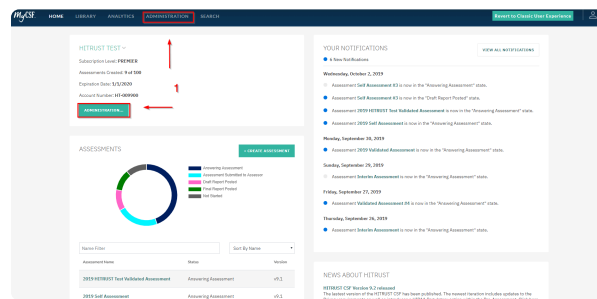


Saving Role

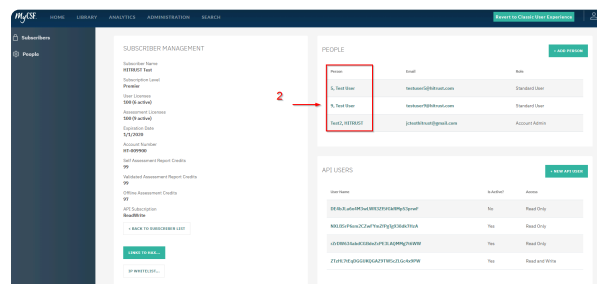
3.2.2. Controlling Assessment Roles

Follow the instructions below to manage a user's Assessment Privileges.

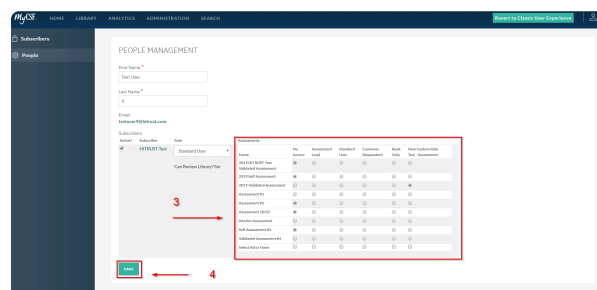
1. From the Homepage, click the 'Administration' button at the top Menu bar or below your Subscription Information.
2. Click on the name of the Assessment you wish to update.
3. From the People Management page, check or uncheck their role delegation to your Organization's Assessment(s).
4. Lastly, click the 'Save' button.



Administration Button



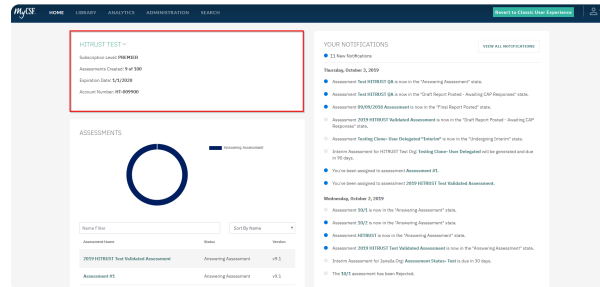
Subscriber Management



Saving Assessment Role

4. Homepage

The Homepage of MyCSF is the starting location for every user that authenticates through the HITRUST Portal. From here, you can easily locate Assessments, Subscription Information, Your Notifications, Custom Libraries and more.



Subscription Information

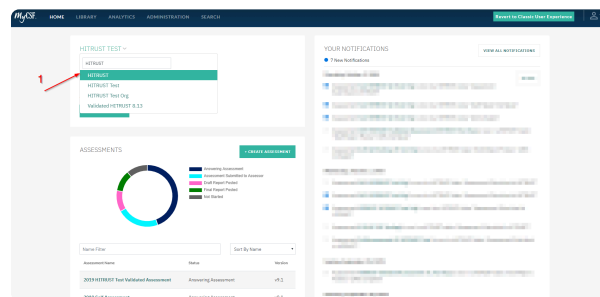
Subtopics

- [Setting Your Organization](#)
- [Selecting Your Assessment](#)
- [Viewing Notifications and Tasks](#)
- [Creating a Custom Assessment Library](#)
- [News About HITRUST](#)

4.1. Setting Your Organization

Your Organization will hold all of the Assessments under this particular subscription. You can have a quick look at 'Subscription Level', 'Number of Assessments Created', and 'Expiration Date' for this Organization.

On the MyCSF Homepage, click the dropdown inside the 'Your Organization' panel. You can also search in the dropdown to more quickly locate an organization.



Selecting a Subscriber



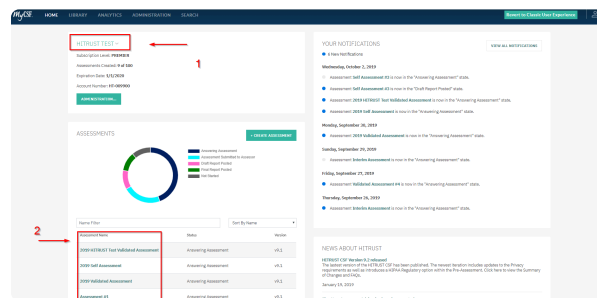
Note: If you belong to one organization, this option will be automatically selected.

4.2. Selecting Your Assessment

After setting your Organization an Assessment table will appear with all of the Assessments within your account. Atop the 'Assessments' table, is a donut chart displaying a consolidation of the statuses of your Assessments. Click on portions of the donut chart to filter accordingly. Search for an Assessment in the text box for faster selection.

* Note: Standard Users and Customer Respondents will only have access to the Assessments they have been assigned to.

1. On the MyCSF Homepage, click on your organization's name in the dropdown box inside the Your Organization panel. You can also type in the text field for your organization in case you have many organizations under your subscription.
2. Next, click on the Assessment you would like to access and begin scoping. If you do not have any existing assessments, have an Account Administrator click on the "Create + Assessment" button.

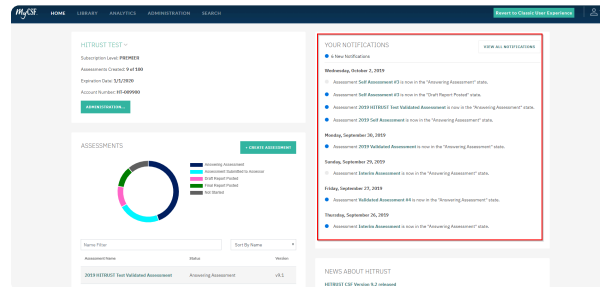


Selecting an Assessment

4.3. Viewing Notifications and Tasks

Tasks can be assigned to anyone with access to MyCSF. Provision tasks to anyone that you may feel will be an asset to completing your Assessment.

1. From the MyCSF Homepage, there is a 'Your Notifications' component positioned on the right-hand side of the view. This element will detail the date and description of the assignments that have been delegated to you.

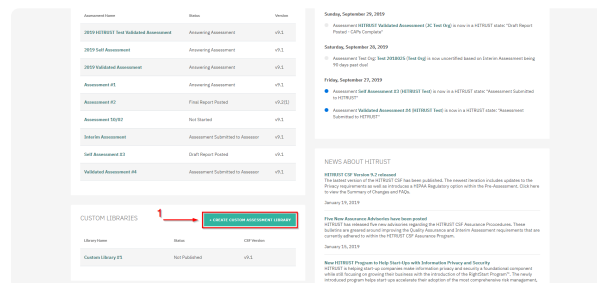


Your Notifications

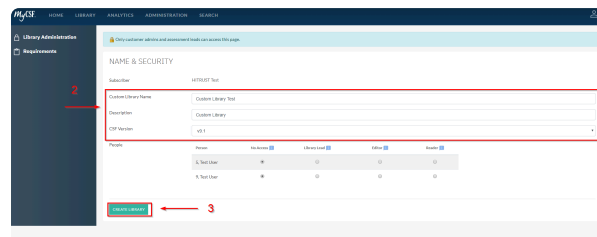
4.4. Creating a Custom Assessment Library

Account Administrators are able to create and manage a Custom Assessment using the HITRUST CSF and its Authoritative Sources using HITRUST provided questions. Please follow the steps below on how to create a customized Assessment Library.

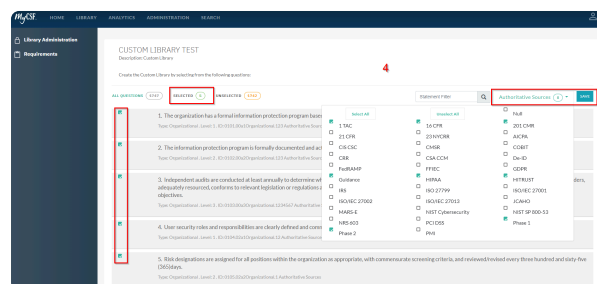
1. From the MyCSF Homepage, beneath the Assessments table is a 'Custom Libraries' table. Click the '+ Create Custom Assessment Library' button.
2. Enter a 'Custom Library Name', 'Description' and select the CSF Version you would like to create from.
3. Lastly, click the 'Create Library' button.
4. After creation, you will be permitted to hand-pick HITRUST questions to include within your Custom Library.



Create Custom Assessment Library



Create Library



Authoritative Sources

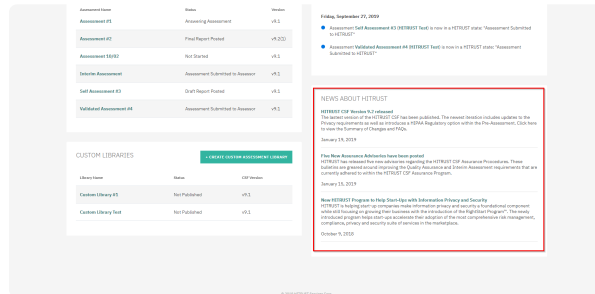


This feature is only available to Corporate and Premier Subscribers

4.5. News About HITRUST

This zone of the 'MyCSF Homepage' contains global announcements relating to the state of MyCSF. This includes patches, enhancements, HITRUST CSF releases, and impending expiration's.

From the MyCSF Homepage, there is a 'News About HITRUST' panel positioned on the bottom right-hand side of the view. Select a link that best suits the information that you are looking for over MyCSF.



The screenshot shows the MyCSF homepage interface. On the right side, there is a 'News About HITRUST' panel. The panel contains several news items, including:

- Friday, September 20, 2020**
 - Assessment Tool Assessment K3 HITRUST Tool is now in a HITRUST state: "Assessment Submitted to HITRUST"
 - Assessment Tool Assessment K4 HITRUST Tool is now in a HITRUST state: "Assessment Submitted to HITRUST"
- NEWS ABOUT HITRUST**
 - HITRUST CSF Version 5.0 released**
The latest version of the HITRUST CSF has been published. The current version includes updates to the HITRUST CSF framework, including the addition of new controls and the removal of others. For more information, please visit the HITRUST website.
 - For Risk Assessment Methods have been granted**
HITRUST has released four new publications regarding the HITRUST CSF Assessment Procedures. These publications provide detailed information regarding the HITRUST CSF Assessment Procedures. For more information, please visit the HITRUST website.
 - New HITRUST Program to Help Stand-By with Information Privacy and Security**
HITRUST is helping your organization meet information privacy and security requirements. The new HITRUST program helps you ensure that your organization is compliant with the HITRUST CSF framework, privacy and security standards of services in the marketplace.

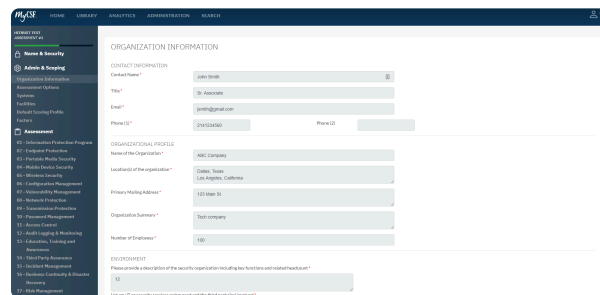
Below the news items, there is a 'CUSTOM LIBRARIES' section with a table showing the status of various libraries.

Library Name	Status	CSF Status
Custom Library #1	Not Published	v5.0
Custom Library Test	Not Published	v5.0

News About HITRUST

5. Pre-Assessment

Topics in Pre-Assessment include: Creating a New Assessment and Scoping an Assessment.

The screenshot shows the 'Organization Information' form in the MyCSF 2.0 application. The form is divided into several sections: 'CONTACT INFORMATION' with fields for 'Contact Name', 'Title', 'Email', and 'Phone'; 'ORGANIZATIONAL PROFILE' with fields for 'Name of the Organization', 'Location of the Organization', 'Primary Mailing Address', 'Organization Summary', and 'Number of Employees'; and 'ENVIRONMENT' with a 'Description of the environment' field. The left sidebar contains a navigation menu with categories like 'Home & Security', 'Assessment', and 'Reporting'. The top navigation bar includes links for 'HOME', 'LIBRARY', 'ANALYTICS', 'ADMINISTRATION', and 'SETTINGS'.

Organization Information

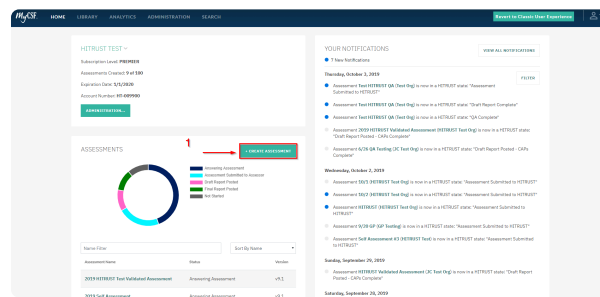
Subtopics

- [Creating a New Assessment](#)
- [Scoping an Assessment](#)

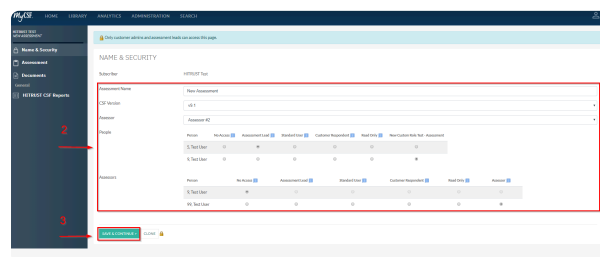
5.1. Creating a New Assessment

If you are an Account Administrator, you'll be able to simply add a new Assessment directly through the homepage of MyCSF.

1. From the MyCSF Homepage, click the '+ Create Assessment' button on the 'Assessments' table found under the Organization panel.
2. You will be redirected to the Name & Security page to enter the 'Assessment Name' and select the 'CSF Version', and 'Assessor'. You may also set the permissions for the people within your account.
3. Lastly, click the 'Save & Continue' button.



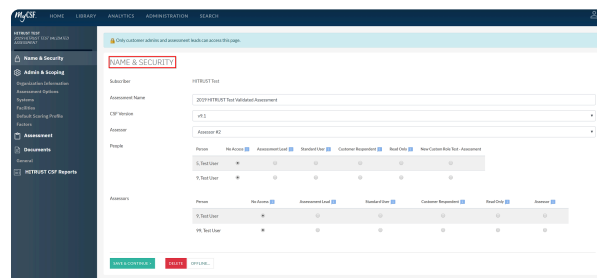
Create Assessment



5.1.1. Name & Security

The Name & Security page is where you will be able to see the administrative information pertaining to the Assessment. You can navigate to this page while filling out this assessment whenever you like.

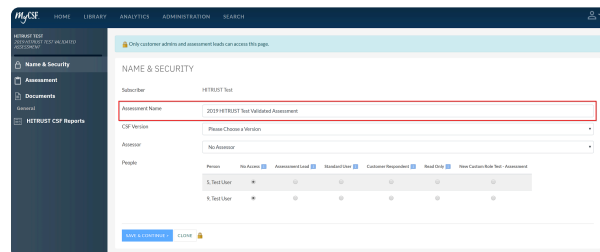
1. After authenticating through the MyCSF Portal, click on your organization's name in the dropdown box inside the Your Organization panel. You can also type in the text field for your organization in case you have many organizations under your subscription.
 2. Next, click on the Assessment you would like to begin scoping and answering in the Assessments panel.
 3. Click on the 'Name & Security' in the left Navigation Bar to access your Assessment information.
- Alternatively, this is where a user lands when they initiate a new Assessment.



Name & Security

5.1.1.1. Assessment Name

On the Name & Security page, there is a text input reserved for the name of the Assessment. The name will help you identify it easily from any other assessment you may have. For example: “2019 ABC Company Validated Assessment”, “2019 ABC Company Self-Assessment”.



NAME & SECURITY

Sub-User: HITRUST Test

Assessment Name: 2019-HITRUST Test Validated Assessment

Assessor: Please Choose a Version

Assessor: No Assessor

People

Name	No Issues	Assessment Lead	Standard View	Custom Response	Read Only	New Custom Rule Test - Assessment
S. Test User						
K. Test User						

Link & Controls: Name

Assessment Name

5.1.1.2. CSF Version

On the Name & Security page, you will be permitted to choose an active CSF Version that you may use for your Assessment.

Only customer admin and assessment leads can access this page.

NAME & SECURITY

Subscriber: HITRUST Test

Assessment Name: 2019 HITRUST Test Initiated Assessment

CSF Version: v5

Assessor: No Assessment

People

Name	Role	Assessment Lead	Standard Owner	Customized Dependencies	Read Only	New Custom Rule Set / Assessment
S. Test User	*	U	U	U	U	U
T. Test User	*	U	U	U	U	U

Back & Continue Done

CSF Version

5.1.1.3. Selecting an Assessor

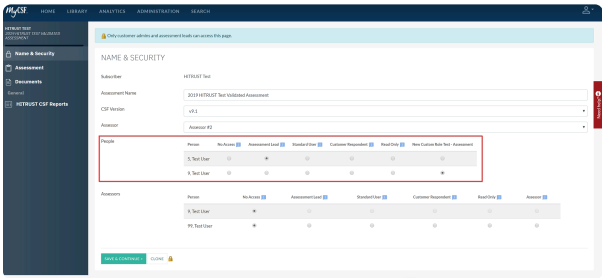
On the Name & Security page, you will be permitted to choose an active Assessor Firm that will be Validating this Assessment.

Person	No Access	Assessment Lead	Standard User	Customer Representative	Read Only	Non-Custom Role Test - Assessment
S. Test User						
M. Test User						

Selecting Assessor Form

5.1.1.4. Setting User Access

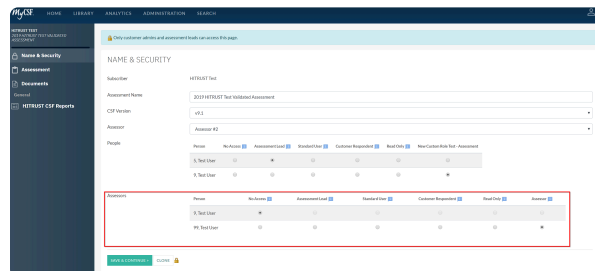
From the Name & Security page, you will be able to set the users associated with this Assessment under the People section. Place your users in the table as either No Access, Assessment Lead, Standard User, Customer Respondent, Read Only, or a Custom Role. You can access this section of the page at any time by pressing the Lock Icon on the left Sidebar.



User Permissions

5.1.1.5. Setting Assessor Access

From the Name & Security page, here is where you will be able to see the assessor permissions associated with the assessment. You can also navigate to this page while filling out this assessment whenever you like by clicking on the Lock Icon.

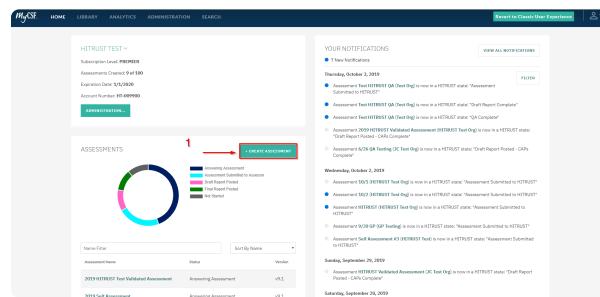


Assessor Permissions

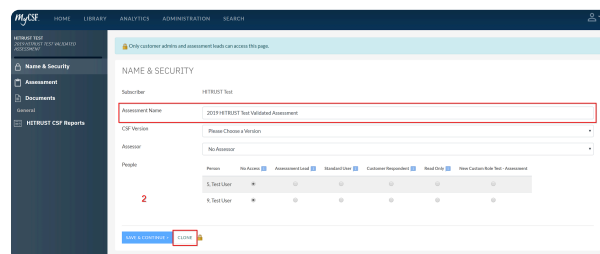
5.1.1.6. Cloning an Assessment

Cloning an Assessment gives you the ability to transfer all maturity scores, comments, and documents from an existing Assessment into a newly created one. If you are wishing to complete a new Assessment with existing data from a previous Assessment, follow the instructions below on Cloning an Assessment.

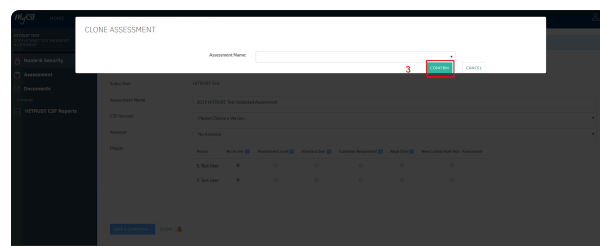
1. From the Homepage, click the 'Create New Assessment' button to start the process of a new Assessment.
2. From the Name & Security page, input an Assessment Name then click the 'Clone' button at the end of the form.
3. A modal will appear with a list of existing Assessments from your Account. Choose the one you'd like to replicate and click 'Confirm'.



Create Assessment



Clone



Cloning an Assessment

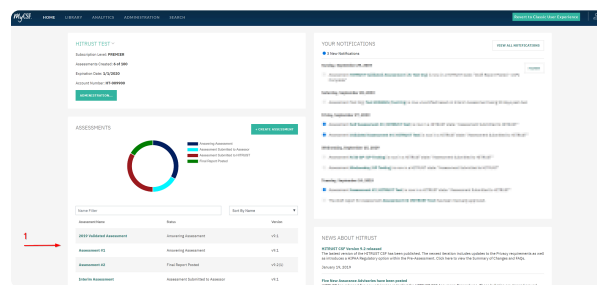
5.1.1.7. Deleting an Assessment

Deleting an Assessment will be permanently removed from MyCSF. Only Account Admins and Assessment Leads have the privilege to delete an Assessment. The status of the Assessment must be 'Not Started' or 'Answering Assessment', as well as not submitted to the Assessor or HITRUST.

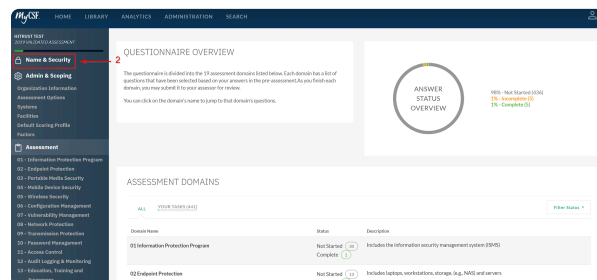


Note: Once an Assessment has been deleted, all of the data will be permanently removed from MyCSF.

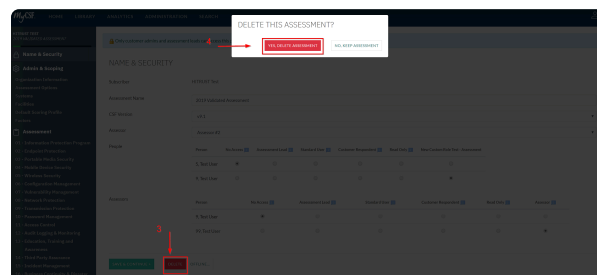
1. From the MyCSF Homepage, choose an Assessment on the 'Assessments' table you wish to delete.
2. From the Questionnaire Overview page, click the 'Name & Security' label on the left Navigation Bar.
3. Click the 'Delete' button towards the bottom of the page. A confirmation message will appear, confirming if you would like to proceed with the deletion.
4. Lastly, click the 'Yes, Delete Assessment' button.



Select Assessment to Delete



Name & Security



Delete Assessment

From the Homepage of MyCSF, you can view any Assessment that has been generated. To view an Assessment, please follow the steps below to access and view an Assessment within your MyCSF Account.

1. From the Homepage, there is an 'Assessments' table that includes all of the Assessment that has been generated.
2. Click on an Assessment Name to access and view the Assessment Questionnaire.



5.2. Scoping an Assessment

The scope of the Assessment is the information about your organization that will be used to narrow down the most precise assessment for your compliance and security needs. Fields marked with red asterisks are mandatory.

1. After authenticating through the HITRUST Portal click on your organization's name in the dropdown box inside the Organization panel. You can also type in the text field for your organization in case you have many organizations under your subscription.
2. Next, click on the assessment you would like to begin answering in the Assessments panel. If you do not have any existing Assessments, have an Account Administrator click on the Create New Assessment button.
3. If you are Creating a New Assessment, you will be taken to the Name & Security section of MyCSF to Setup Users, CSF Version, and your HITRUST Assessor under your organization.
4. Either by clicking on the Cogs Icon on the Sidebar, or by pressing 'Save & Continue' on the Name & Security page, you will be directed to the Organization Information page to begin scoping. You will automatically be redirected to this page if your assessment has not been started.
5. There are six elements that contribute to satisfactorily scoping an assessment. MyCSF will connect you to the succeeding page by clicking the 'Save & Continue' button at the conclusion of all of the Scoping pages. You can also quickly navigate to specific components by using the Sidebar on the left side of the page after Selecting an Assessment.

5.2.1. Organization Information

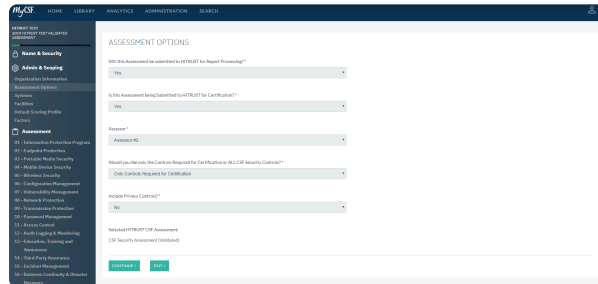
The fields in this page range from Contact Information, Organizational Profile, and the Corporate Environment text boxes. Press 'Save & Continue' when you are finished.

1. Contact Information – Fill in the text boxes with mandatory fields: Contact Name, Title, Email, Phone (1). Phone (2) is optional.
2. Organizational Profile – Fill in the text boxes with mandatory fields: Name of the Organization, Location(s) of the Organization, Primary Mailing Address, Organization Summary, and Number of Employees.
3. Environment – Fill in the text boxes with mandatory fields: A description of your security organization's key functions and related headcount and any IT/security services outsourced and the third parties involved.

Organization Information

5.2.2. Assessment Options

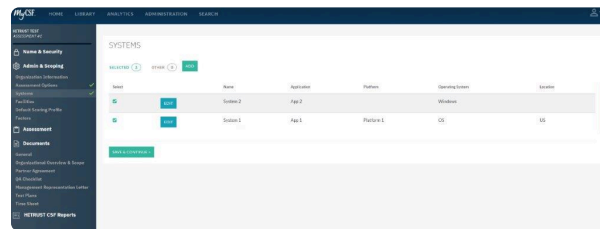
Answer the dropdowns provided to determine what kind of assessment will be generated by MyCSF. This includes Targeted, CSF Security, CSF Security & Privacy, CSF Comprehensive Security, and CSF Comprehensive Security & Privacy Assessments. The level of validation will be determined as well through this component. Press 'Save and Continue' when you are finished.

The screenshot shows the 'ASSESSMENT OPTIONS' form in the MyCSF application. The form is located in the 'ASSESSMENT' section of the left-hand navigation menu. The form contains several dropdown menus and checkboxes. The first dropdown is 'Would this Assessment be submitted to HITRUST for Report Processing?' with 'Yes' selected. The second dropdown is 'Is this Assessment being Submitted to HITRUST for Certification?' with 'Yes' selected. The third dropdown is 'Assessment' with 'Assessment #2' selected. The fourth dropdown is 'Would you like the Controls Required for Certification or Full CSF Security Controls?' with 'Only Controls Required for Certification' selected. The fifth dropdown is 'Include Privacy Controls?' with 'No' selected. At the bottom of the form, there are two buttons: 'Continue' and 'Save'. The 'Continue' button is highlighted in green.

Assessment Options

5.2.3. Systems

This is your catalog of systems that will be examined in your assessment. The 'Selected Tab' will show all of the systems that are to be assessed. The 'Other Tab' represents systems that have been applied to your organization previously but will not be assessed. Press 'Save & Continue' when you are finished.

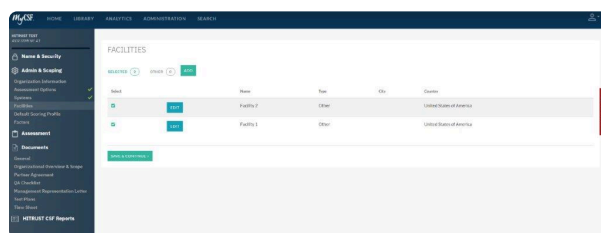


Systems

- **Selected Tab** – This tab shows the systems that will be assessed in your assessment. Deselect each system if you would like to remove them from scope in the checkbox besides its respective name.
- **Other Tab** – This tab shows the systems that will not be assessed in your assessment, Select each system if you would like to add them to the scope in the checkbox besides its respective name.
 - **Show Inactive** – You will not be able to delete systems under your organization, but you can place them as 'Inactive' so they will not appear in your systems for any future assessments. Press the 'Edit Button' on the system you would like to remove and press 'Inactive'. If you would like to see all the systems you have placed as inactive
- **Add Button:** – This will allow you to create a new system. Click in the top-right hand corner of the page to find the 'Add' button. New systems will be automatically be placed in the Selected category.
 - **Name:** – A name to identify a system in your organization that can be readily identified to users that will be working on this assessment.
 - **Application:** – This is the name of the application issued in the environment.
 - **Platform:** – The physical location of the implemented system.
 - **Operating System:** This is the operating system (OS) of the system.
 - **Databases:** – If applicable, the type of databases that are used by the implemented system.
 - **System Prior Assessment:** – This is the Date and Type of Audit/Assessment this system has last undergone.
 - **Description:** – An explanation of the system in your environment.
 - **Comments:** – Anything that may be be useful to the users that are not addressed in the prior fields.
- **Edit Button** – Edit your existing by either going in your Selected Tab or your Other Tab and press Edit.
 - **Inactive** – A check mark represents that the system is no longer applicable to the organization you have chosen. Press 'Save & Continue' when you are done

5.2.4. Facilities

This is your catalog of facilities that will be addressed in your assessment. The **'Selected Tab'** will show all of the facilities that will be addressed. The **'Other Tab'** represents systems that have been applied to your organization previously, but will not be assessed. Press **'Save & Continue'** when you are finished.



- **Selected Tab** – This tab shows the facilities that will be assessed in your assessment. **Deselect** each facility if you would like to remove them from scope in the checkbox besides its respective name.
- **Other Tab** – This tab shows the facilities that will be addressed in your assessment. **Select** each facility if you would like to add them to the scope in the checkbox besides its respective name.
 - **Show Inactive** – You will not be able to delete facilities under your organization, but you can place them as **'Inactive'** so they will not appear in your Facilities. Press the **'Edit Button'** on the facility you would like to remove and press **'Inactive'**. If you would like to see all the facilities you have placed as inactive, push **'Show Inactive'** under the **'Other Tab'**.
- **Add Button:** – This will allow you to create a new facility. Click in the the top-right hand corner of the page to find the **'Add Button'**.
 - **Name:** – A name to identify a facility in your organization that can be readily identified to users that will be working on this assessment.
 - **Facility Type:** – Choose they type of facility that will be included.
 - **Street Address:** – The physical location where the facility is located in.
 - **City:** – The city name of where this facility is located.
 - **State/Province:** The state name or province of where this facility is located.
 - **Country:** – Choose the country where this facility is located.
 - **Zip:** The zip code where this facility is located.
 - **Description:** – Details about the facility being added.
 - **Comments:** – Anything that may be useful to other users that are not addressed in the prior fields.

Edit Button – Edit an existing facility by either going in your **'Selected Tab'** or your **'Other Tab'** and press the **'Edit Button'**.

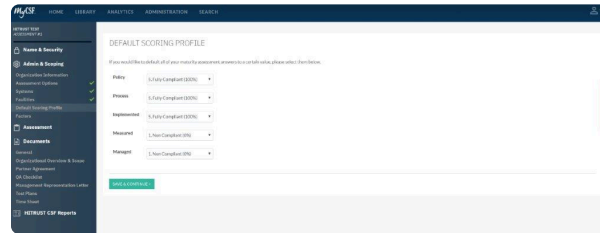
- **Inactive** – A check mark represents that the facility is no longer applicable to the organization you have chosen. Press **'Save & Continue'** when you are done.



Editing a facility will contain all the information from the **'Add Button'** criteria plus **'Inactive'**.

5.2.5. Default Scoring Profile

This option allows you to pre-score the maturity values for the Assessment. This is a desirable function for your organizations who have established trends within their Assessment. The Default Scoring Profile values defined will be applied to all Not Started statements.



- **Policy** – Is there a policy in place?
- **Process** – Is there a process or procedure to support the policy?
- **Implementation** – Has it been implemented?
- **Measure** – Is it being measured and tested by management to ensure it is operating.
- **Managed** – Are the measured results being managed to ensure corrective actions are taken as needed?

Click on '**Save & Continue**' to move onto the **Factors** section.

5.2.6. Factors

The inputs on the Factors tab are used to measure the risk inherent to your environment. The information provided within will be used to narrow down the list of assessment statements for your questionnaire.

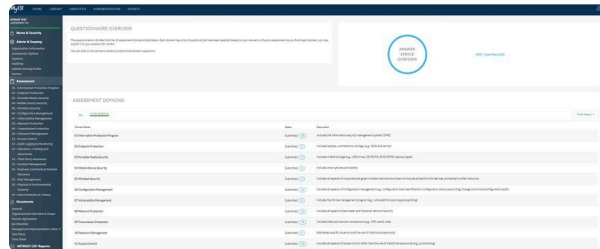
- **General Factors** – These factors are used to identify characteristics about your organization.
- **Organizational Factors** – These factors are used to measure organizational risk.
- **Geographical Factors** – These factors are used to measure geographic risk.
- **System Factors** – These factors are used to measure system risk.
- **Regulatory Factors** – These factors are used to calculate compliance mandates.

Click on **'Save & Continue'** to move onto your **'Assessment Questionnaire'**.



Note: For Regulatory Factors, you may choose more than one.

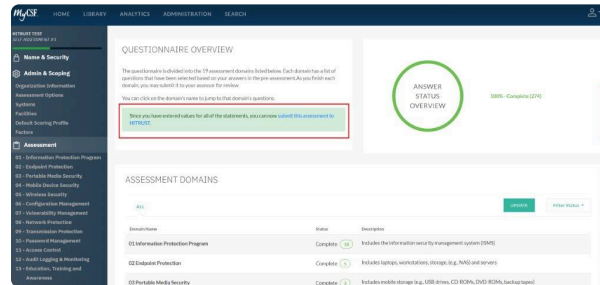
After completing the Scope of your Assessment, you can begin answering the questions that have been generated based on your scope. Topics range from: Completing an Assessment, Marking Not-Applicable, Assigning a User, CAP Management, Authoritative Sources, Assessment Statement Log, and more .



- [Completing an Assessment](#)
- [Submitting an Assessment](#)

6.1. Completing an Assessment

There are many components to completing an assessment. This includes: [Answering an Assessment Statement](#), [Assigning Respondents](#), [Related Authoritative Sources](#), [Risk Factors](#), [History Statement Log](#), [Illustrative Procedures](#), [Adding a Document](#), and [CAP Management](#).



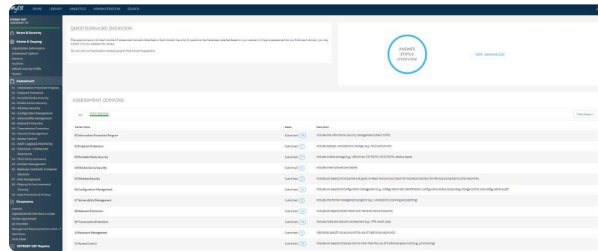
* Note: The scope of the assessment only applies to this organization only, not all of your organizations.

Subtopics

- [Viewing an Assessment Domain](#)
- [Answering an Assessment Statement](#)
- [Creating an Offline Assessment](#)

6.1.1. Viewing an Assessment Domain

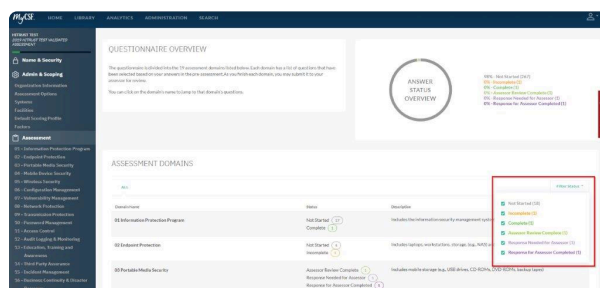
To view the Assessment Statements you have generated in the [Scope of your Assessment](#) press on the [Pencil Icon](#) in the left Nav bar so you may be able to view your [Assessment Questionnaire](#). Choose one of your nineteen domains to begin answering one of your Assessment Statements.



1. After [Selecting your Assessment](#), you will land on the assessment homepage containing the assessment domains.
2. On your [Table of Assessment Domains](#), choose a domain that is relevant to your interest. A list of your Assessment Statements will appear.

6.1.1.1. Assessment Domain Status Filters

On your [Table of Assessment Domains](#), you will be able to filter each domain within your assessment by its respective status. A corresponding count and color will appear within a badge icon for each status currently found in a domain.



Here is a list of all possible badge statuses that you will come across detailing the completeness of your Assessment Questionnaire:

‘Not Started’ – These are domains that contain Assessment Statement that you have not entered any information.

‘Incomplete’ – These are domains that contain Assessment Statements contains some but not all the mandatory inputs.

‘Complete’ – These are Assessment Statements that have been provided all necessary information.

‘Assessor Review Pending’ – These are domains that have been sent to your assessor for validation, but they have not began reviewing your assessment statements.

‘Assessor Review Complete’ – These are domains that have been sent to your assessor for validation and have been completed.

‘Response for Assessor Needed’ – These are Assessment Statements that you must respond back to your assessor for their review.

‘Response for Assessor Completed’ – These are Assessment Statements that you have responded back to your assessor after their review.

‘Assessor QA Response Needed’ – These are the Domains that require a response from QA.

‘Assessor QA Response Complete’ – These are the Domains that QA has completed.

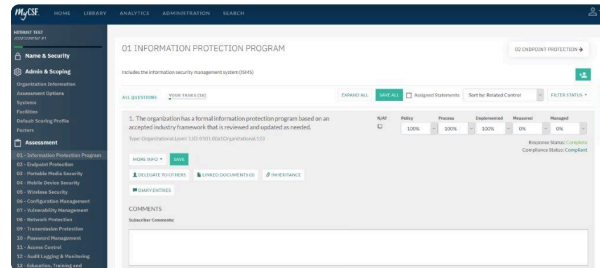
‘CAPs Required’ – If any Assessment Statements are in need of Corretive Action Plans, they will be forced into this State.

‘CAPs Completed’ – For Statements that mandate a Corrective Action be logged, this state will appear if a CAP has been documented.

‘Submitted’ – Once QA has finalized all of the information over the Assessment Statements with your assessor, the submitted badge will show up on your [Table of Assessment Domains](#).

6.1.2. Answering an Assessment Statement

There are many components to completing an assessment. This includes: [Answering a Statement](#), [Assigning a Respondent](#), [Related Authoritative Sources](#), [Risk Factors](#), [History Assessment Log](#), [Illustrative Procedures](#), [Adding Documents](#), and [CAP Management](#).

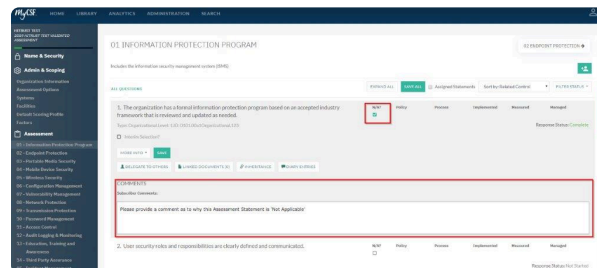


1. On your [Table of Assessment Domains](#), choose one that is relevant to your interest.
2. A list of your Assessment Statements will appear; select one that you would like to answer. Once picked, it will expand and expose the attributes that can be modified.
3. Use the five maturity inputs on the right half of the page to complete the Assessment Statement. Provide any wanted commentary in the text area beneath the maturity dropdowns.
4. Press **'Save'**.

6.1.2.1. Setting Assessment Statements as Not Applicable

Assessment Statements may need to be marked as **Not Applicable (N/A)**. If there are Assessment Statements that you feel you do not need to comply, check the **N/A** box within a statement.

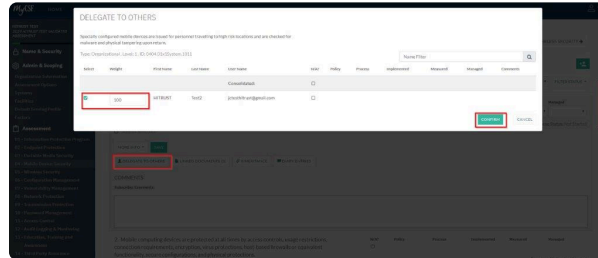
✿ You will be required to provide rationale in the comments.



1. From the [Assessment Domain](#), click on the Assessment Statement you wish to flag as '**Not Applicable**'.
2. Press the '**N/A**' checkbox provided in the Assessment Statement chosen.
3. To complete this Assessment Statement, enter justification in the comments field.
4. Press '**Save**'.

6.1.2.2. Assigning a User

Assigning a user to an Assessment Statement is a beneficial tool to better manage resources and aggregate a collection of responses.



1. From the [Assessment Domain](#), click on the Assessment Statement you wish to assign.
2. Press the **'Actions'** button and choose **'Delegate to Others'** .
3. A table of potential users will appear. Click checkbox next to the appropriate users' names to have them provisioned to the Assessment Statement.
4. After a user is assigned, be sure to provide an integer in the **Weight** column. This value denotes the percentage that the individual's reply is worth in the final calculation.
5. A notification will be sent to the assigned individuals informing them of appending task. They will be able to view all of these in the **'Tasks'** panel on the **'Homepage'**.

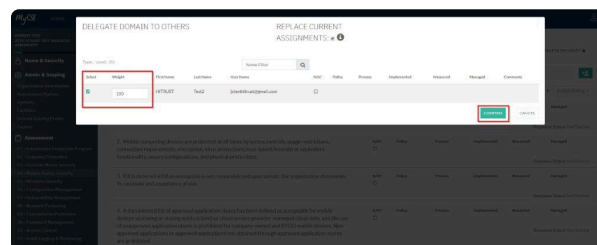
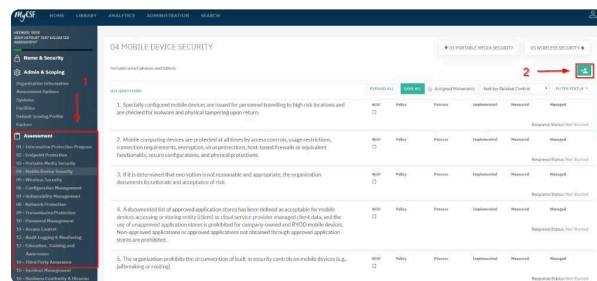


Assigned Statements will be documented on the Homepage as **Tasks**

6.1.2.3. Adding a User to an Assessment Domain

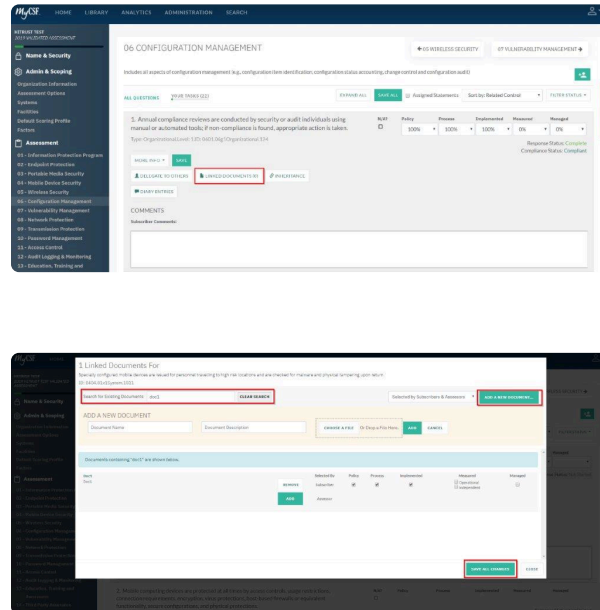
Assigning a User to an Assessment Domain is a beneficial tool to better manage resources and aggregate a collection of responses.

1. From the Assessment Questionnaire, click on the Assessment Domain you wish to assign.
2. From the Assessment Domain, click on the 'Add' icon located atop the far right-hand corner.
3. A table of users will appear to select the checkbox next to the appropriate users' names to have them provision the Assessment Domain.
4. You will need to add a 'Weight' for the User you are assigning. Ensure that the total weight adds up to 100. If you want to only update the unassigned Statements, uncheck the 'Replace Current Assignments' checkbox. **Note: The Sum of the Weights of the selected users should equal 100, and you may only enter positive whole numbers as weights.**
5. Lastly, click the 'Confirm' button.



6.1.2.4. Adding a Related Document

If you wish to document evidence for an Assessment Statement, use the related documents functionality. You can either reference items previously uploaded or new items that are not yet in your Document repository.



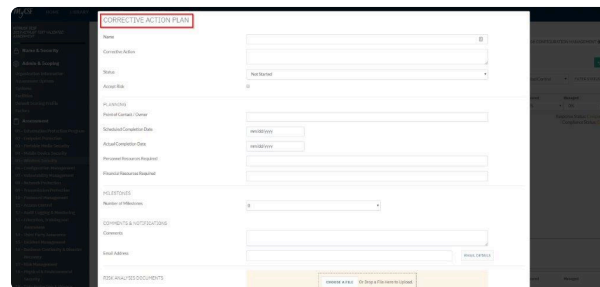
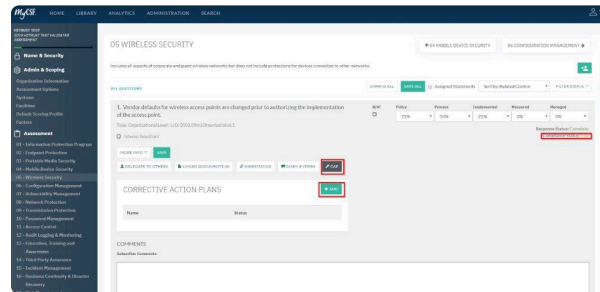
1. From the Assessment Domain, click on the Assessment Statement that you wish to link evidence.
2. Click the 'Linked Documents' button.
3. A modal will appear for you to search for existing documents in your Document Repository. Or you may add a new document, by clicking the 'Add A New Document' button.

6.1.2.5. Inheriting an Assessment Statement

See [Inheriting an Assessment Statement](#)

6.1.2.6. Adding Corrective Action Plans

For Statements where deficiencies are found, you are able to detail Corrective Actions that will help remediate the identified problem.

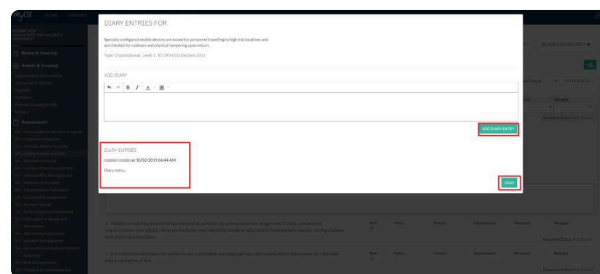
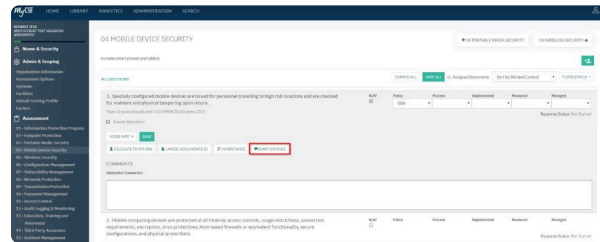


Note: Only the organization's user can enter CAPs, the assessor cannot.

1. From the Assessment Domain, click on the Assessment Statement that you wish to log the Corrective Action Plan (CAP).
2. Click the 'CAP' button.
3. A table will appear. Click the 'Add' button.
4. A subsequent window will appear so that you may enter details about your Corrective Action Plan.

6.1.2.7. Adding a Diary Entry

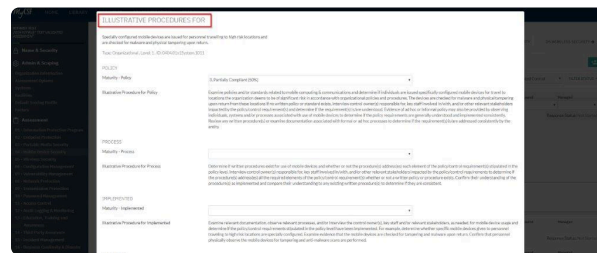
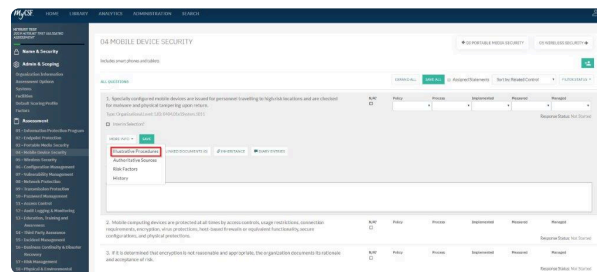
The Diary will enable you to enter comments on each of your Assessment Statements to communicate within your organization or assessor.



1. From the Assessment Domain, click on the Assessment Statement that you wish to input a Diary entry.
2. Click on the 'Diary Entries' button.
3. A subsequent window will emerge allowing you to place your notes in the text box.
4. Press "Add Diary Entry" to have the text saved to the Statement. Note: This information is not captured in your HITRUST CSF Report.

6.1.2.8. View the Illustrative Procedures

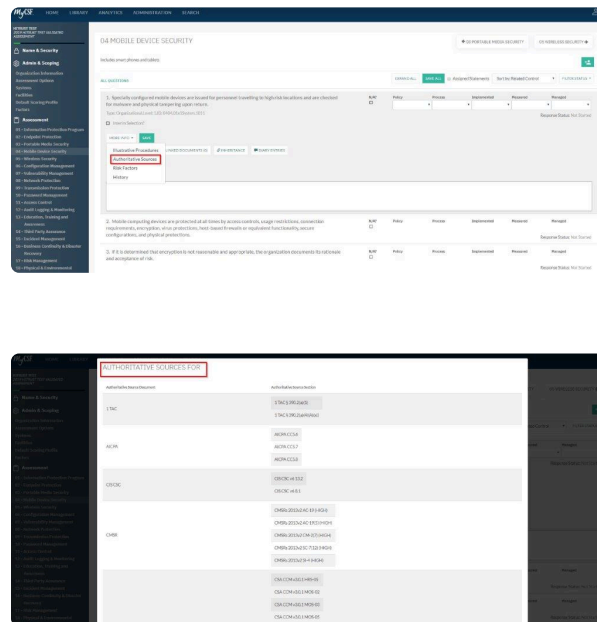
Use the Illustrative Procedures to help clarify the necessary components to accurately score the statement.



1. From the Assessment Domain, click on the Assessment Statement that you wish to view the Illustrative Procedures.
2. Click the 'More Info' button and choose 'Illustrative Procedures'.
3. You can change the maturity scores within the 'Illustrative Procedures' screen by the adjusting the dropdowns and pressing Confirm at the bottom of the screen.

6.1.2.9. View the Authoritative Sources

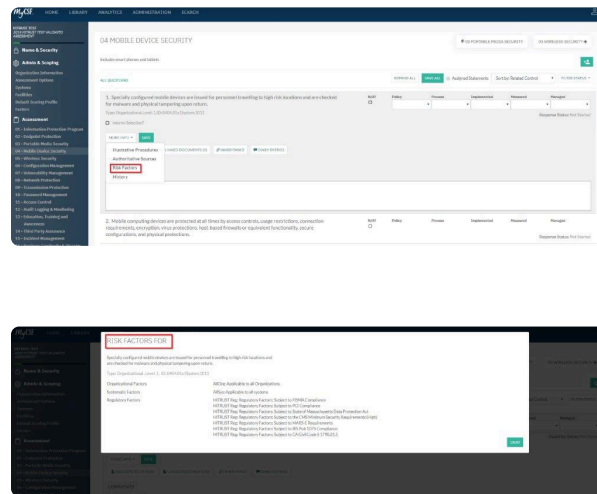
If you're interested in the standards and regulations that comprise an Assessment Statement, use the **Authoritative Sources** link under the **More Info** dropdown.



1. From the [Assessment Domain](#), click on the Assessment Statement you wish to view the Authoritative Source.
2. Click on '**More Info**' dropdown and choose '**Authoritative Sources**'.

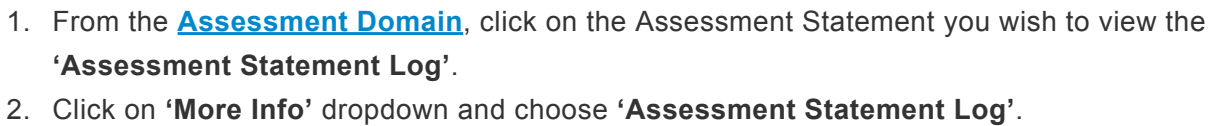
6.1.2.10. View the Risk Factors

Review the Risk Factors that apply to an Assessment Statement. Remember you can change the scope of your assessment if the information does not look correct or if an environment change has occurred by going to ****Administrative & Scoping** in the Nav bar.



1. From the [Assessment Domain](#), click on the Assessment Statement you wish to see the relevant **'Risk Factors'**.
2. Click on **'More Info'** dropdown and choose **'Risk Factors'**.

Keep track of the users who have answered an Assessment Statement by accessing the Assessment Statement Log. MyCSF archives who modified a statement and when they did it.

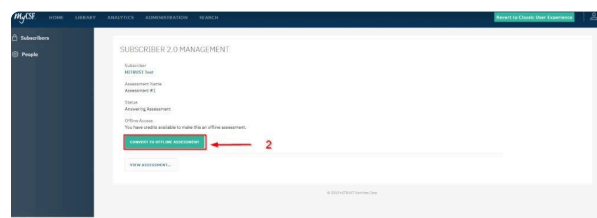
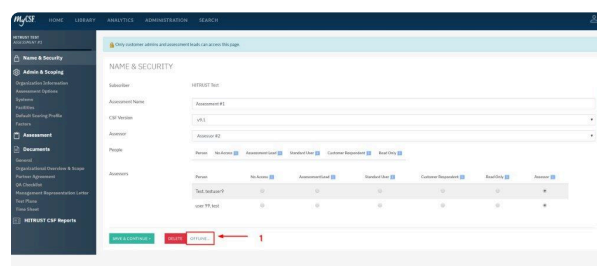


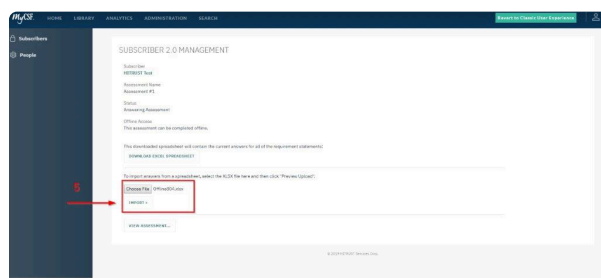
6.1.3. Creating an Offline Assessment

An Offline Assessment gives you the ability to complete an Assessment outside of MyCSF using a spreadsheet and seamlessly import it back into the application. If you have a MyCSF Subscription and wish to complete your Assessment offline, follow the instructions below on Creating and Importing an Offline Assessment.

* Please note, that only Account Administrators and/or Assessment Leads can import an Offline Assessment.

1. From the MyCSF Homepage, select the Assessment you wish to answer offline. Please know that the Questionnaire must already be generated to be completed using a spreadsheet. From within the Assessment, go to the 'Name & Security' page and click on the 'Offline' button towards the bottom of the page.
2. You will be directed to the Assessment's Status page to enable the offline capabilities for this Assessment. Click on the 'Convert to Offline Assessment' button at the bottom of the screen.
3. Once converted, click on the 'Download Excel Spreadsheet' button. Your browser will download a spreadsheet where you can add maturity scores, comments, and map documents existing in your Assessments Document Repository. Please note, you must save the file with the name provided when downloaded.
4. After you have completed the Offline Assessment, go to the 'Name & Security' page and click on the 'Offline' button. Click on 'Choose File' and select your file. **Please note that the 'Ignore Blank Cells' and 'Preserve Documents' check boxes will be checked by default.**
5. Once selected, click the 'Import' button.





- ✿ An Assessment that is setup to be used offline can also be completed using the traditional browser method. The two can be used in combination to achieve optimal results.

6.1.3.1. Answering your Assessment's Statements

Once you have downloaded the excel spreadsheet, you are now able to answer your Assessment Statements offline.

1. From the spreadsheet, click on the 'Assessment' sheet to select if a Statement is or not applicable, maturity scores for each maturity level, and comments.
2. Column F is where you select 'Yes' or 'No' for a Statement that is not applicable to scope. **Please note, if a Statement is deemed not applicable, then a comment must be provided.**
3. Columns G-K is where you select the maturity scores for Policy, Process, Implementation, Measured, and Managed.
4. Lastly, column L optionally, is where you provide comments for each statement.

6.1.3.2. Managing your Documents

All of the documents that exist in your Assessments Document Repository will be listed in the excel spreadsheet. You will have the ability to manage existing documents as well as adding new documents (without an attachment) in your Repository.



Please note that when importing as the Subscriber the Assessment must be with the Subscriber and if importing as an Assessor then the Assessment must be with the Assessor.

1. From the spreadsheet, click on the 'Documents' sheet to manage your documents existing in your Assessments Document Repository as well as adding new documents to your Repository when importing.
2. Column B is where you input the name of the document. You may also update any of the document names that are currently listed. Deleting a document, requires deleting the entire row.
3. Column C is where you input a description of the document. You may also update any of the descriptions that are currently listed.
4. Column D is where you select if the document should be added to the Subscriber tab or Assessor tab in your Repository.

6.1.3.3. Linking Statements and Documents

If you have documents in your Document Repository and/or have added new documents in the excel spreadsheet, you have the ability to link them to your Assessment Statements.



Please note that Account Admins, Assessment Leads, and Assessors can do the below.

1. From the spreadsheet, click on the 'Requirement-Document Mapping' sheet to map documents to Assessment Statement's maturity levels.
2. Column B is where you input the Baseline Unique ID of the Assessment Statement. **Please note, you must input the exact 'Baseline Unique ID' for the file to import successfully.**
3. Column C is where you input the document name you wish to link to the Assessment Statement. **Please note, you must enter the exact 'Document Name' from the 'Documents' sheet, for the file to import successfully. Also, when pasting, please ensure that no extra "spaces" are added.**
4. Columns D-H is where you select 'True' or 'False' on the maturity level you wish to link the document name to.

6.1.4. Creating and Importing Assessor Evaluation for an Offline Assessment

When a Validated Assessment has been submitted to an Assessor, you the Assessor has the ability to fill-out your evaluation outside of MyCSF using a spreadsheet and seamlessly import your evaluation back into the application. Follow the instructions below on Creating and Importing your Assessor Evaluation.



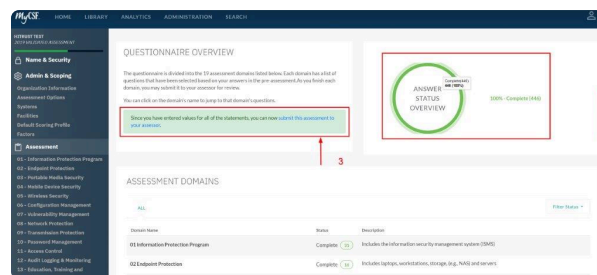
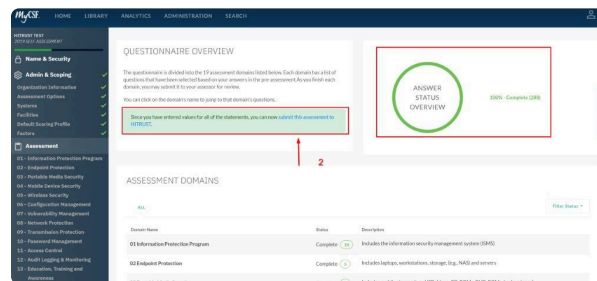
Please note that only Assessors that have been assigned to the Assessment can import an Offline Assessment.

1. From the MyCSF Homepage, click the Assessment that has been submitted to you. From within the Assessment, go to the 'Name & Security' page and click on the 'Offline' button towards the bottom of the page.
2. You will be directed you to the Assessment's Status page to download the excel spreadsheet. Click on the 'Download Excel Spreadsheet' button.
3. Once downloaded, you now have a spreadsheet where you can add maturity evaluation, comments, and map documents existing in the Document Repository. Please note, when downloading the spreadsheet, you must save the file with the name provided when downloaded.
4. After you have completed the Offline Assessment, go to the 'Name & Security' page and click on the 'Offline' button. Click on 'Choose File' and select your file. *Please note that the 'Ignore Blank Cells' and 'Preserve Documents' checkboxes will be checked by default. *
5. Once selected, click the 'Import' button.

6.2. Submitting an Assessment

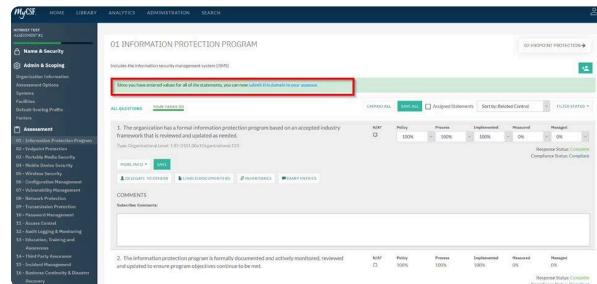
Whether submitting a Self-Assessment or a Validated Assessment by your assessor organization, the Assessment Questionnaire can be submitted either by each fully completed domain (Validated only) or by completing the entire Assessment (Self-Assessment/Validated Assessment).

1. Once all Assessment Statements has been answered and has an Answer Status Overview of a '100% – Complete', you may now submit the Assessment to HITRUST or the Assessor, depending on the type of Assessment that's being completed.
2. If you have a Self-Assessment, click the link 'Since you have entered values for all of the statements, you can now submit this assessment to HITRUST'.
3. If you have a Validated Assessment, click the link 'Since you have entered values for all of the statements, you can now submit this assessment to your assessor'.



6.2.1. Submit a Domain to an Assessor

When you are ready to submit your domain to your assessor for validation, press the link located in the green banner above the Assessment Statements for the Domain that you've finished. This link will not become available until all of the Assessment Statements have been complete. This option is only for those who are pursuing a Validated Assessment and not for Self-Assessments.



1. From the Assessment Homepage, click the Assessment Domain that is ready to be submitted to the Assessor.
2. Assuming you have completed each of your Assessment Statements in each domain look at the top of any domain and hover over the green background on the top of your domain and press Submit your Domain.
3. You will then be prompted with an, 'Are you sure you want to send this Domain to your Assessor' and click OK.

6.2.2. HITRUST's Criteria for Submission

If you have completed all of the Assessments Statements in either your Self or Validated Assessment to HITRUST, please verify that the below is covered before submitting it.

1. Ensure that the following Required Documents have been uploaded with the correct dates as well as ensuring the correct templates are being used.

- **Organizational Overview & Scope** – This document can only be uploaded by the Assessor.
- **QA Checklist** – This document can only be uploaded by the Assessor.
- **Test Plans** – This document can only be uploaded by the Assessor.
- **Partner Agreement** – Please ensure that the date of this agreement is within one (1) calendar year from the current date. This document can be uploaded by the Client and/or Assessor.
- **Management Representation Letter** – Please ensure that the date of this letter is the same date as the end date of the fieldwork or up to 14 days after the end date for fieldwork. This document can be uploaded by the Client and/or Assessor. *Please note that this is the only Required Document for a Self-Assessment.*
- **Time Sheet** – Please ensure the Time Sheet includes the Fieldwork dates which should not be older than 90 days of the submission date and at least 50% of the Assessor hours worked on this engagement have been done so by Certified Practitioner(s). The Time Sheet can only be completed by the Assessor.

2. Depending on the type of Assessment that's being completed, ensure the appropriate Assessment credit is available. If you do not have a credit, please contact sales@hitrustalliance.net

3. For Validated Assessments, please ensure that all documentation/evidence has been linked to Maturity levels scored above 0%.



To ensure you are completing the correct template for each Required Document, please see the following link: <https://help.mycsf.net/templates>.

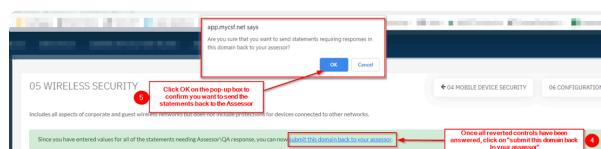
6.2.3. Submitting External Assessor Reverted Controls Back to the External Assessor

When an External Assessor reverts an Assessment Statement back to their client, the returned Assessment Statement will display a “Response Needed for External Assessor” status. To address these Assessment Statements, you as the client will need to do the following.

1. Take note of the External Assessor’s comments in the External Assessor Comments field.
2. Make the recommended adjustments according to the External Assessor’s suggested score and comments, if provided.
3. Once the adjustment is made, click on Save. You may amend the Subscriber Comments to reflect these new adjustments, but this is not required.
4. Once all reverted Assessment Statements have been answered, click on “submit this domain back to your assessor” link atop the page.
5. Click OK on the pop-up box to confirm you want to send the Assessment Statements back to the External Assessor.



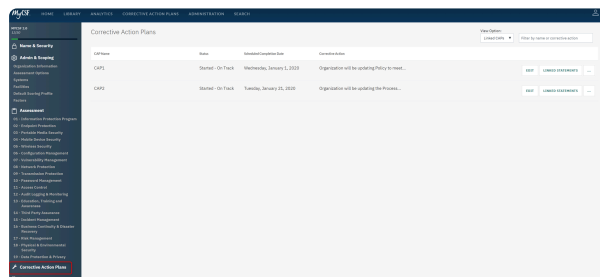
Response Needed for External Assessor



Submitting back to External Assessor

6.3. Corrective Action Plans (CAPs) in Your Assessment

Because CAPs can be linked to Statements within an Assessment, you may be interested in which CAPs have been associated collectively to an Assessment. This can be done by simply going to the Assessment (link to viewing an assessment) for which you wish to see the underlying CAPs. The Sidebar of the application will contain a section titled “Corrective Action Plans”, that when clicked, will render an interactive table with all of the linked CAPs for this Assessment.



CAP Name	Due	Current Statement	Current Action		
CAP1	Monday - 01/01/20	Security Policy	Organization will be updating Policy to meet...	Link to Statement	Link to CAP
CAP2	Tuesday, January 21, 2020	Security Policy	Organization will be updating Policy to meet...	Link to Statement	Link to CAP

Corrective Action Plans

Sub-topics

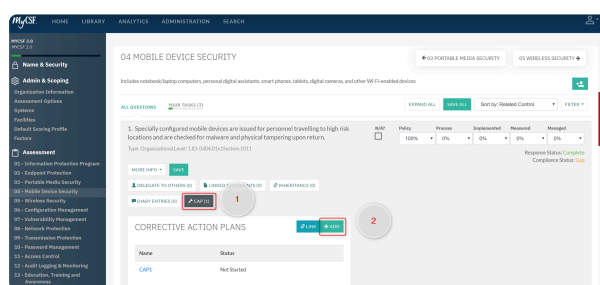
- [Adding CAPs to a Statement](#)
- [Linking CAPs to a Statement](#)
- [Unlinking CAPs from a Statement](#)

✿ [Why Can't I Create a CAP?](#)

6.3.1. Adding CAPs to a Statement

For Statements that have been identified as a Gap or as requiring a Corrective Action, CAPs can be added directly from an Assessment Domain. In order to do this, it does require the “Can Manage CAPs” permission to be set if you are not an Account Administrator.

1. On the Statement, press the “CAP” button. A table will appear with two buttons atop of it.
2. Click the “Add” button and fill-out the Action Plan with the necessary information.
3. When done, press “Confirm” to save the CAP to your Repository as well as link the CAP to the active Statement.



Adding a CAP

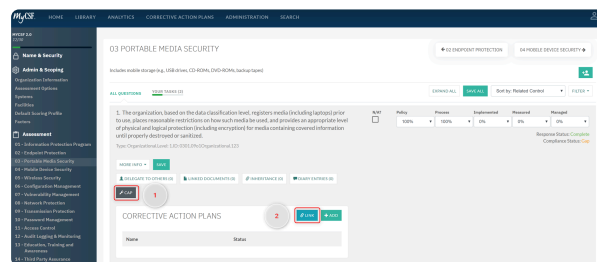
Inputting CAP

 [Why Can't I Create a CAP?](#)

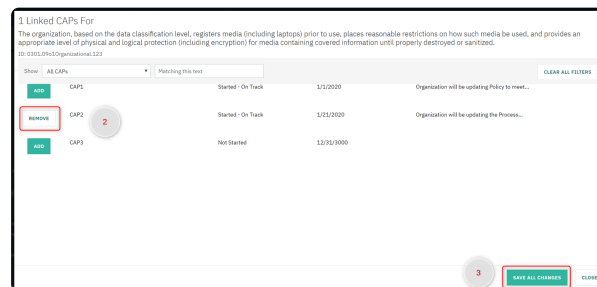
6.3.2. Linking CAPs to a Statement

For Statements that have been identified as a Gap or as requiring a Corrective Action, CAPs in your Repository can be linked directly from an Assessment Domain. In order to do this, it does require the “Can Manage CAPs” permission to be set if you are not an Account Administrator.

1. On the Statement, press the “CAP” button. A table will appear with two buttons atop of it.
2. Click the “Link” button and press “Add” on the CAPs within the modal that you wish to tie to this Statement.
3. Once added, click the “Save all Changes” button.



Link CAP



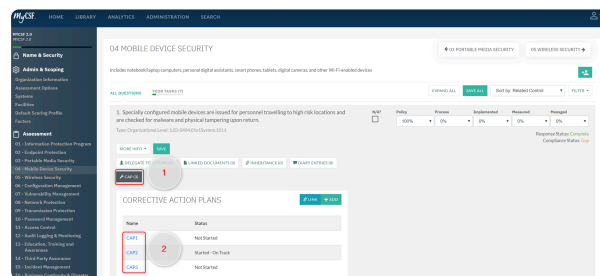
Saving Linked CAP

✿ [Why Can't I Link a CAP?](#)

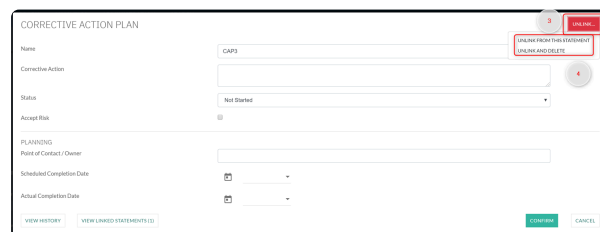
6.3.3. Unlinking CAPs from a Statement

CAPs that you no longer wish to have linked to a Statement can be removed from a Statement in a few clicks.

1. On the Statement, press the “CAP” button to expand the CAP table.
2. Select the CAP you want to have disassociated from the active Statement.
3. Once selected, atop of the CAP modal press the “Unlink” button.
4. When it is clicked, two options are presented: Select “Unlink from this Statement” if you want to merely unlink it otherwise select “Unlink and Delete” to have it removed from your CAP Repository all together.



Selecting Linked CAP



Unlinking Selected CAP

Another method for unlinking CAPs is possible via the “Corrective Action Plans” menu option on the Assessment’s Sidebar. Clicking the “Linked Statements” button on a CAP will allow you to quickly add or remove CAPs on the Statements of your Assessment.

6.4. Potential Quality Issues

In order to maintain the integrity of a HITRUST Assessment, MyCSF analyzes each Statement's responses and comments to ensure they are aligned with the expectations of the HITRUST Assurance requirements.

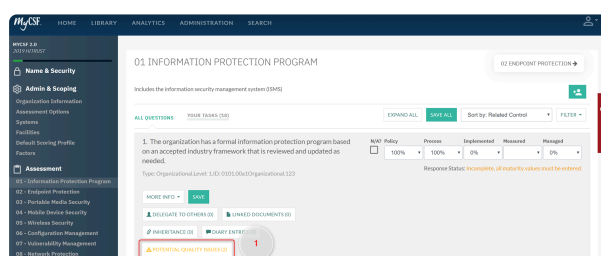
Sub-topics

- [Viewing Potential Quality Issues](#)
- [Overriding a Potential Quality Issue](#)

6.4.1. Viewing Potential Quality Issues

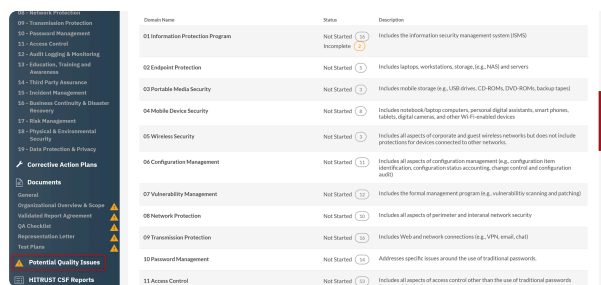
There are two ways within MyCSF to view the Potential Quality Issues raised within your Assessment. The first manner is observing them on a Statement while inside an Assessment Domain. The second option is to view all of the Potential Quality Issues in a consolidated list.

1. Statements with present Potential Quality Issues will be denoted with a “Caution” symbol that indicates an issue has been found.
2. Clicking this icon will cause a modal to appear that will outline all of the found potential quality issues for this Statement including a remedial recommendation.



Potential Quality Issues on a Statement

1. If you wish to view all of the Potential Quality Issues in a consolidated list, press the “Potential Quality Issues” item towards the bottom of the left navigation bar.
2. Once clicked, you will be rushed to the consolidated list of Potential Quality Issues found within your Assessment.



Potential Quality Issues

6.4.2. Overriding a Potential Quality Issue

The analysis MyCSF runs to check for Potential Quality Issues may sometimes lead to false positives. Because of this, these occurrences can be overridden and excused from remediation. However, if a Potential Quality Issue is overridden, a detailed rationale must be provided in order to explain the falsely identified issue. This rationale will be reviewed by your Assessor as well as HITRUST to validate that the Potential Quality Issue was unnecessary.

7. Corrective Action Plans (CAPs)

Corrective Action Plans (CAPs) you add through MyCSF are inherently associated with your Organization in what is called the CAP Repository. This is done in an effort to allow you to reuse previously entered CAPs, vastly simplifying the management of these Corrective Action Plans within MyCSF.

Given you have the appropriate privileges, your CAPs are always easily reachable from the Navigation Bar no matter where you are in the tool by pressing the “Corrective Action Plans” menu option.



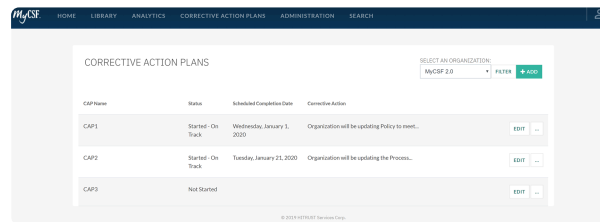
[You can also manage your CAPs at the Assessment level as well.](#)

Sub-topics

- [Viewing Your Organization's CAP Repository](#)
- [Creating CAPs](#)
- [Modifying CAPs](#)
- [Unlinking CAPs](#)
- [Deleting CAPs](#)
- [Managing Your CAP Repository's Access](#)

7.1. Viewing Your Organization's CAP Repository

Given you have the appropriate privileges, your CAPs are always easily reachable from the Navigation Bar no matter where you are in the tool by pressing the “Corrective Action Plans” menu option.

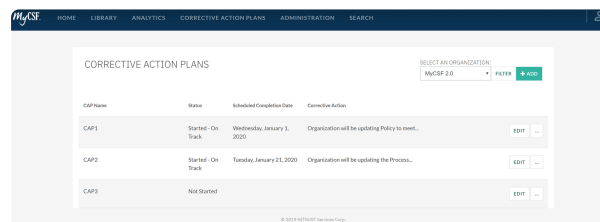


CAP Repository

7.2. Creating CAPs

There are two ways a CAP can be added to your Organization's Repository: Either as a result of defining them within one of your Assessments or by adding them directly into the Repository. This topic will cover the latter.

1. From your CAP Repository page (link), you will see a table cataloging all of the CAPs belonging to your Organization.
2. Click the blue "Add" button atop of this table and fill-out the Action Plan with the necessary information.
3. When completed, press "Confirm" to save the CAP to your Repository.



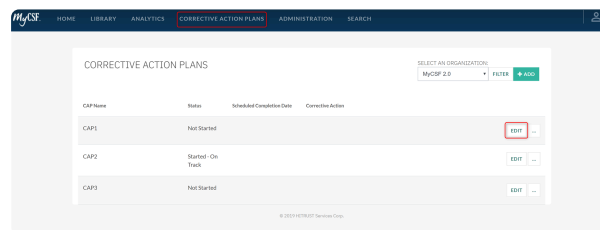
CAP Name	Status	Scheduled Completion Date	Corrective Action
CAP1	Started - On Track	Wednesday, January 1, 2020	Organization will be updating Policy to meet...
CAP2	Started - On Track	Tuesday, January 21, 2020	Organization will be updating the Process...
CAP3	Not Started		

CAP Repository

7.3. Modifying CAPs

For CAPs that have already been created, MyCSF allows you to easily make changes to this CAP either to record progress or refine the information currently documented.

1. From your CAP Repository page (link), you will see a table cataloging all of the CAPs belonging to your Organization.
2. For the CAP you would like to change, either double-click the row or press the “Edit” button.
3. A Modal will appear enabling you to make changes to any of your CAP’s characteristics. Press “Confirm” to save.



Edit CAP

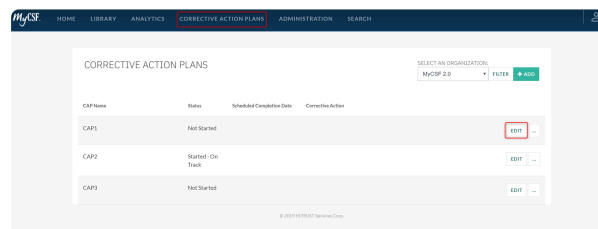
A screenshot of the 'CORRECTIVE ACTION PLAN' modal form. The form is divided into several sections: 'Name' (with a dropdown set to 'CAP1'), 'Corrective Action' (with a text area containing 'Organization will be updating Policy to meet...'), 'Status' (with a dropdown set to 'Started - On Track'), 'Accept Risk' (with a checkbox), 'PLANNING' (with fields for 'Point of Contact / Owner', 'Scheduled Completion Date' (set to '1/10/2020'), 'Actual Completion Date', 'Personnel Resources Required', and 'Financial Resources Required'), 'MILESTONES' (with a dropdown set to '0'), 'COMMENTS & NOTIFICATIONS' (with a text area and an 'EMAIL DETAILS' button), and 'RISK ANALYSIS DOCUMENTS' (with a file upload area). At the bottom of the form, there are buttons for 'VIEW HISTORY', 'VIEW LINKED STATEMENTS (0)', 'CONFIRM' (highlighted with a red box), and 'CANCEL'.

Saving modified CAP

7.4. Unlinking CAPs

As your CAPs are to be designed to be associated with the Gaps present within your Assessments, MyCSF provides a simple way through the Repository to unlink a Plan from a Statement.

1. From your CAP Repository page (link), you will see a table cataloging all of the CAPs belonging to your Organization.
2. For the CAP you would like to unlink, either double-click the row or press the “Edit” button and scroll to the bottom of the succeeding modal and clicking the “View Linked Statements” button.
3. A table will appear indicating all of the Statements that have referenced this CAP. Press the “Unlink” button on the appropriate Statement to have it unlinked.



Edit CAP

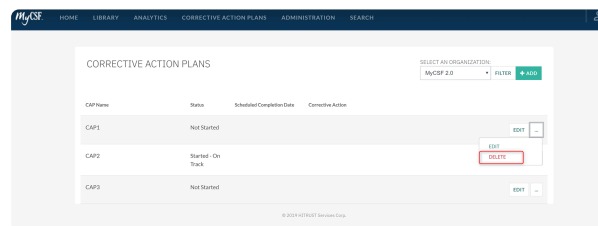
View Linked Statements

Unlink CAP

7.5. Deleting CAPs

CAPs created in error or those that are no longer needed can be removed from your Organization's CAP Repository all together.

1. From your CAP Repository page (link), you will see a table cataloging all of the CAPs belonging to your Organization.
2. Press the "Ellipsis" icon on the row of the CAP you wish to remove. From the resulting drop-down, click the "Delete" option. **Note: The CAP must be first unlinked from all Statements before it can be successfully deleted.**

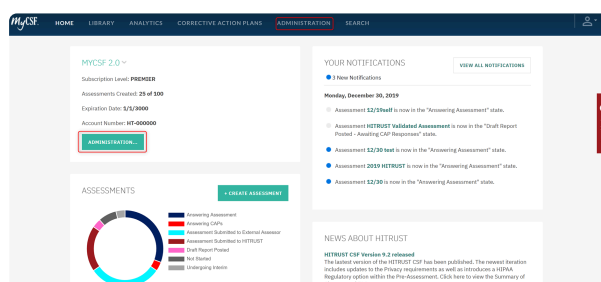


Delete CAP

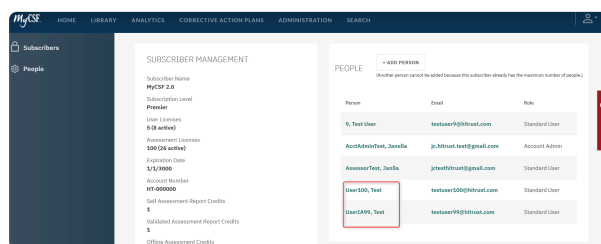
7.6. Managing Your CAP Repository's Access

By Default, only Account Administrators are permitted to both view and edit an Organization's CAP Repository as well as add/link CAPs to an Assessment. However, an Account Administrator can delegate these privileges to Standard Users within their entity in a few simple steps.

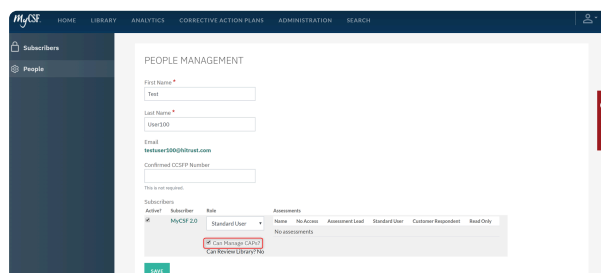
1. From the Homepage, click the 'Administration' button at the top Menu bar or below your Subscription Information.
2. From the Subscriber Management page, you will see all of the authorized users on your account listed. Click the name of the person that you wish to enable the CAP capabilities for.
3. This will connect you to this user's personal page. Scroll down to their "Subscribers" table and check-off the "Can Manage CAPs?" box under their role. Press "Save".



Administration Button



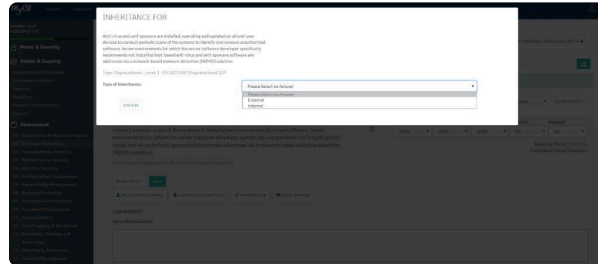
Subscriber Management



Can Manage CAPs?

8. MyCSF Inheritance Program

Whether it be from one of your own or from an authorized Third Party, MyCSF Inheritance can be leveraged to copy over Questionnaire data from another Assessment.



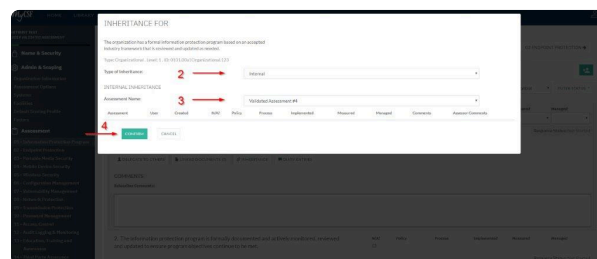
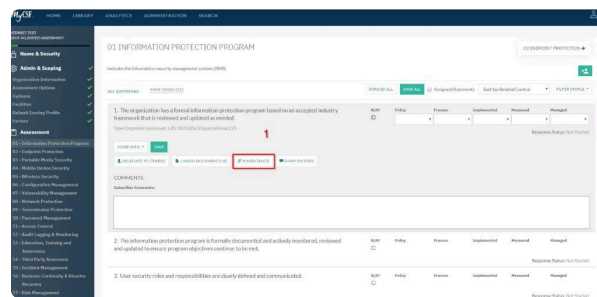
Subtopics

- [Internal Inheritance](#)
- [External Inheritance](#)

8.1. Internal Inheritance

Internal Inheritance permits the transfer of information from one of your previous assessments and record them into your new assessment.

1. From the Assessment Domain, expand the Assessment Statement you wish to inherit. Click the 'Inheritance' button.
2. Under 'Type of Inheritance', select 'Internal'.
3. Select the Assessment from which to copy from the succeeding selection input.
4. Once selected, click Confirm.
5. Lastly, click the 'Save' button to preserve the inheritance.



Note: Internal Inheritance can only be done when both of the Assessment's CSF Version match. There is a potential option by [copying the Assessment](#) to match the CSF Version you are wishing to inherit from.

8.2. External Inheritance

If you are assessing against elements of your organization that are managed by a Third-Party entity AND this Third-Party has opted to share their Assessment Results in the MyCSF Inheritance Program, the responses to their Assessment Statements can be copied over to your assessment. If the Assessment Statement is completely outsourced to your Vendor, [click here](#) for instructions for placing Total Inheritance. If not, [click here](#) for instructions for placing Partial Inheritance where your organization will also need to supply maturity responses.

For all External Inheritance requests, the following values will be transferred from the origin Assessment if approved:

Maturity – Policy

Maturity – Process

Maturity – Implemented

Maturity – Measured

Maturity – Managed

Applicability

Commentary

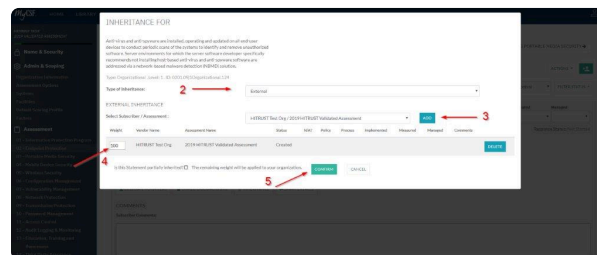
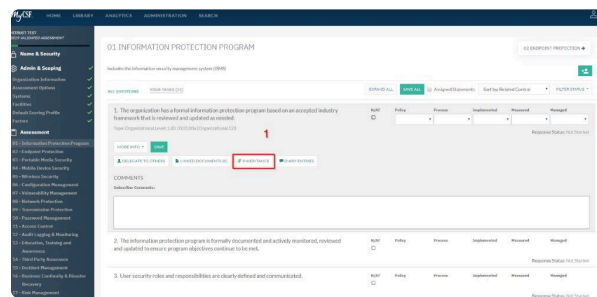
Assessor Commentary

Subtopics

- [Total Inheritance](#)
- [Partial Inheritance](#)
- [Submitting External Inheritance Request to Vendor](#)
- [Applying and Completing External Inheritance Request](#)
- [Approve or Reject External Inheritance Request as a Vendor](#)

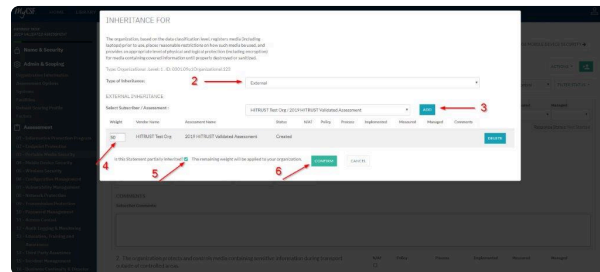
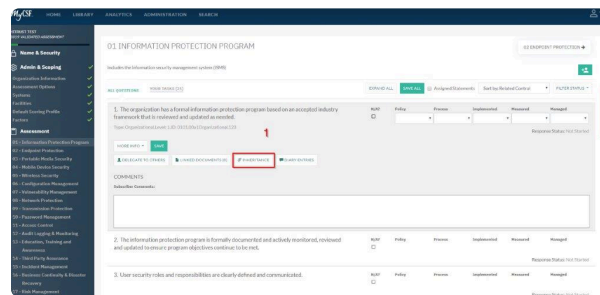
8.2.1. Total Inheritance

1. From the Assessment Domain, click on the Assessment Statement you wish to inherit and click the 'Inheritance' button.
2. Under 'Type of Inheritance', select 'External'.
3. Choose your vendor that is listed beneath the Subscriber/Assessment option and click the 'Add' button.
4. You will need to add a 'Weight' for the Assessment you are requesting. Ensure that the total weight adds up to 100. Note: The Sum of the Weights of the selected Assessment(s) must equal 100% if your organization does not need to contribute to the Assessment Statement's overall score.
5. Lastly, click the 'Confirm' button.



8.2.2. Partial Inheritance

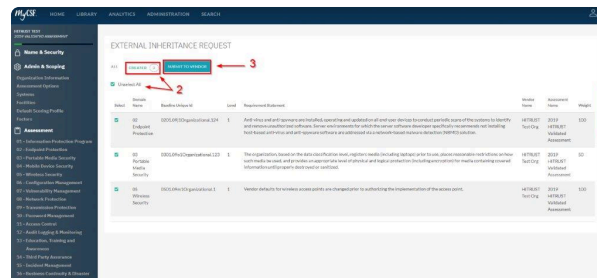
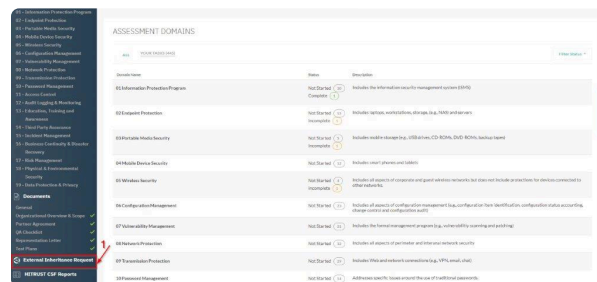
1. From the Assessment Domain, click on the Assessment Statement you wish to inherit and click on 'the Actions' dropdown and select 'Inheritance'.
2. Under 'Type of Inheritance', select 'External'.
3. Choose your vendor that is listed beneath the Subscriber/Assessment option and click the 'Add' button.
4. Designate the percentage that the requested Assessment contributes to the overall score of the Statement. The weight should not equal to 100% as Partial Inheritance is an indication that your organization also wishes to supply scoring to the Assessment Statement.
5. Check the 'Is this Statement partially inherited?' box near the bottom of the modal.
6. Once checked, click the 'Confirm' button.
7. Enter all of the maturity values that your organization wishes to supply to the Assessment Statement
8. Lastly, click the 'Save' button to preserve your maturity values.



8.2.3. Submitting External Inheritance Request to Vendor

You will notice that the Assessment Statement(s) is now displaying an 'Incomplete' status. It will remain in this state until you have completed the request workflow defined below.

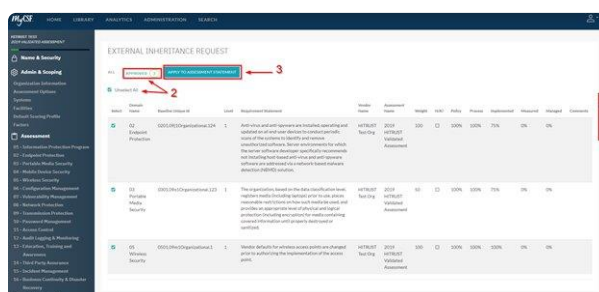
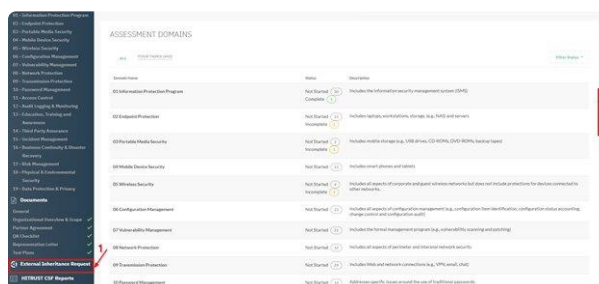
1. Towards the bottom of the sidebar, click 'External Inheritance Request', to be redirected to the External Inheritance Request page.
2. Click on the 'Created' tab and select the Assessment Statement(s) you have requested. You may also click the "Select All" option to have each Created Request be selected collectively.
3. Click the 'Submit to Vendor' button.



8.2.4. Applying and Completing External Inheritance Request

Once you have received a notification that your External Inheritance Request has been approved, you must now apply the scores to the Assessment Statement.

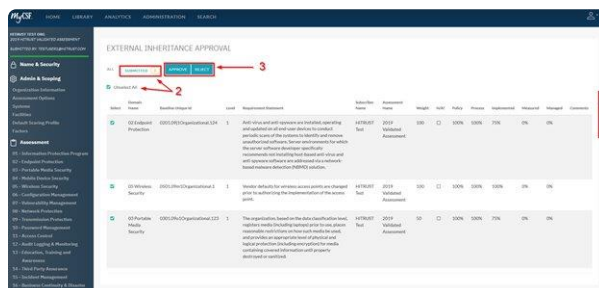
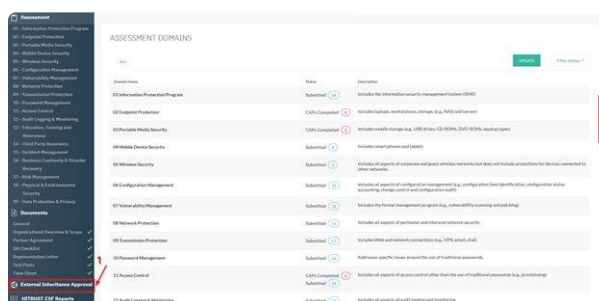
1. Towards the bottom of the sidebar, click 'External Inheritance Request', to be redirected to the External Inheritance Request page.
2. From the External Inheritance Request page, go to the 'Approved' tab and select the Assessment Statement(s) you have requested. You may also click the "Select All" option to have each Approved Request be selected collectively.
3. Click the 'Apply to Assessment Statement' button. You will notice that the Assessment Statement(s) is now displaying a 'Complete' status.



8.2.5. Approve or Reject External Inheritance Request (by Vendor)

If you received a notification that there is a request that an organization is wishing to inherit Assessment Statements from your completed Validated Assessment, you must go to the completed Assessment and rule on the request.

1. On the sidebar, click the 'External Inheritance Approval' icon, to be redirected to the External Inheritance Approval page.
2. Click on the 'Submitted' tab and select the Assessment Statement(s). You may also click the "Select All" option to have each Approved Request be selected collectively.
3. Click the 'Approve' or 'Reject' button(s).

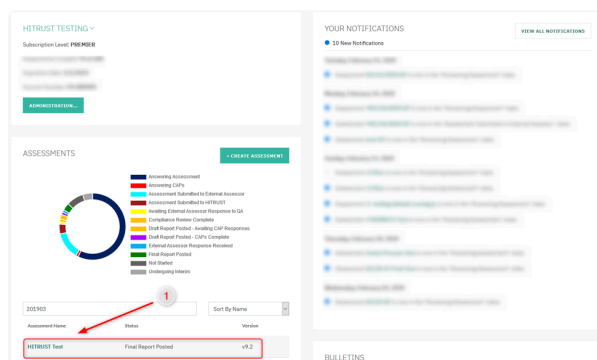


8.2.6. Making Your Assessment Inheritable

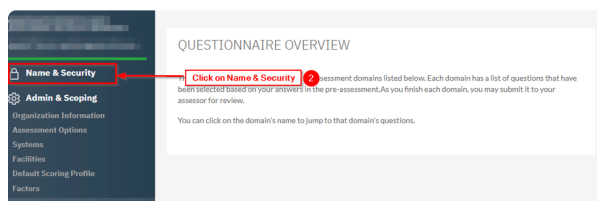
For those of you interested in enrolling your Assessment into the Inheritance Program, follow the steps outlined below.

✿ This feature is available only for Corporate and Premier Subscriptions

1. From the MyCSF Homepage, click on the Assessment you wish to publish in the Inheritance Program to allow other organizations to inherit from (Caution: Publishing an Assessment will list your Organization Name and Assessment Name globally for all users to see). Please note that the Assessment must be a Validated Assessment with a status of “Final Report Posted”.
2. From Assessment Homepage, click on the Name & Security link in the left sidebar.
3. Once on the Name & Security page, check the “Published” box.
4. After you have checked this box, a confirmation message will appear, click Ok and Save. Your assessment will now be selectable within the External Inheritance Program.



Selecting Assessment to Publish



Name & Security



Checking Published Checkbox

qa.mycsf.net says

Confirm you want to publish this Assessment for External Inheritance requests. This will allow users to see your Organization and Assessment Names.

OK

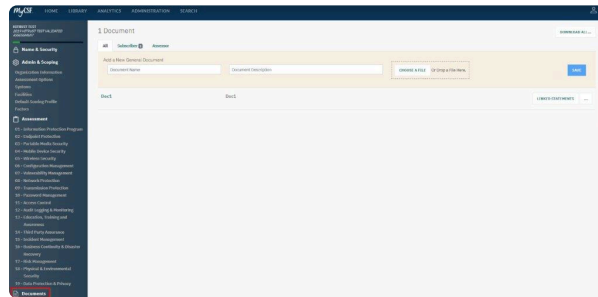
Cancel

Confirming Published Assessment

9. Documents

Support the findings in your Assessment with the linking of evidence. A built-in Repository allows for documents to be referenced while scoring an Assessment Statement.

1. From the Assessment Homepage, there is a 'Documents' label on the left Sidebar.



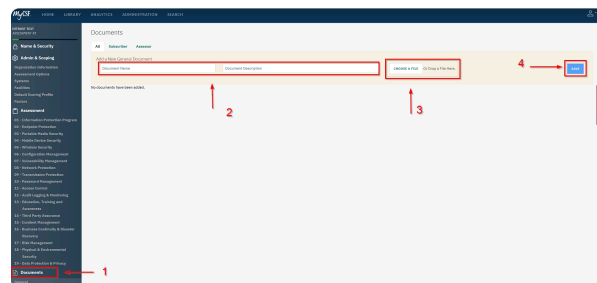
Subtopics

- [Uploading Evidence](#)
- [Downloading Evidence](#)
- [Attaching the Management Representation Letter](#)
- [Attaching the Organizational Overview and Scope](#)
- [Attaching Partner Agreement](#)
- [Attaching the QA Checklist](#)
- [Attaching Test Plans](#)
- [Assessor Timesheet](#)

9.1. Uploading Evidence

Upload a piece of evidence you believe will aid you in your assessment. The documents you provide will help support the 'Assessor' on why certain Maturity Value selections were made.

1. From the MyCSF Homepage, click on the Assessment name you would like to view.
2. You will be directed to the 'Questionnaire Overview' page.
3. On the left navigation bar, click on the 'Documents' link to access the 'Documents' page.
4. Optionally, enter a name in the 'Document Name' and 'Document Description' field about your document.
5. Click the 'Choose A File' button to search for the document you would like to upload. Note: Dragging multiple files is an option as well.
6. Click the 'Save' button.

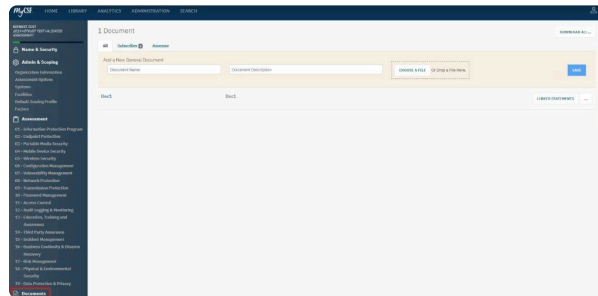


p(banner tip). On Validated Assessments: When one or more supporting assessment artifacts cannot be uploaded into MyCSF, a document must still be identified by name or title (i.e., as a document placeholder). This allows linkages to be created between the document and the corresponding requirements and control maturity levels without the document being actually uploaded into MyCSF. When a requirement is selected for HITRUST's QA for which supporting documentation is identified but not uploaded, a screen sharing session with the external assessor and HITRUST's QA team is necessary.

9.1.1. Uploading Documents in Bulk

If you have a MyCSF Subscription, uploading documents in bulk is now available to do within an Assessment. Please follow the instructions below on how to bulk upload documents within an Assessment.

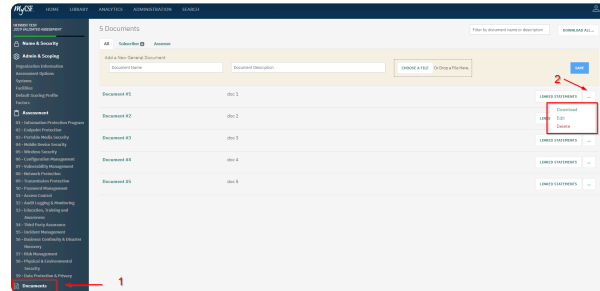
1. On the sidebar, click the 'Documents' icon to be redirected to the Assessment's Document Repository.
2. From your File Explorer, select all of the documentation you would like to upload. Once selected, you may drag and drop the files where it reads 'Drop a File Here'.



9.2. Downloading Evidence

If you are looking to download evidence individually, follow the instructions below on Downloading Evidence.

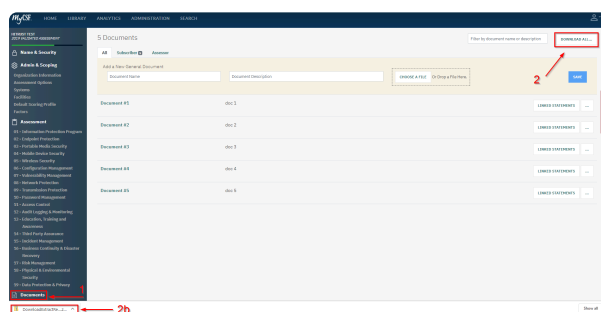
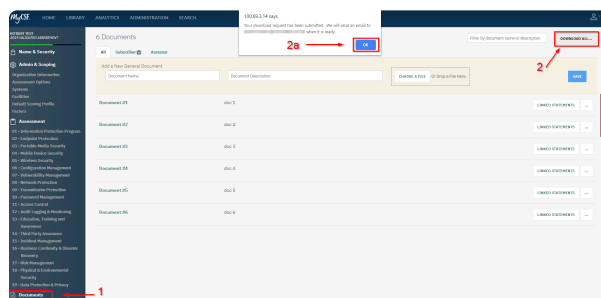
1. On the sidebar, click the 'Documents' icon to be redirected to the Assessment's Document Repository.
2. From the Document Repository, click the name of the Document you wish to download or click the dropdown menu button adjacent to the 'Linked Statements' button and click 'Download'.



9.2.1. Downloading Documents in Bulk

If you have a MyCSF Subscription, downloading documents in bulk is now available to do within an Assessment. Please follow the instructions below on how to bulk download documents within an Assessment.

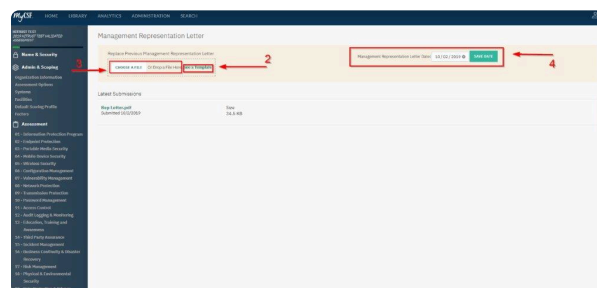
1. On the sidebar, click the 'Documents' icon to be redirected to the Assessment's Document Repository.
2. Click on the 'Download All' button to download all the attachments within the Document Repository.
 - a. If there are more than 5 Documents attached, you will be emailed a link to retrieve all attachments within a zipped folder. **Note: The email will be coming from no-reply2@mail.mycsf.net with a Subject Line of MyCSF Document Extract.**
 - b. If there are 5 or fewer documents attached, your download will initiate instantly.



You must have a Professional Subscription or above to have this capability.

Every Assessment submitted to HITRUST must include a Management Representation Letter executed on your Organization's Letterhead, signed by the appropriate level of management overseeing the Assessment, and dated the last day of testing.

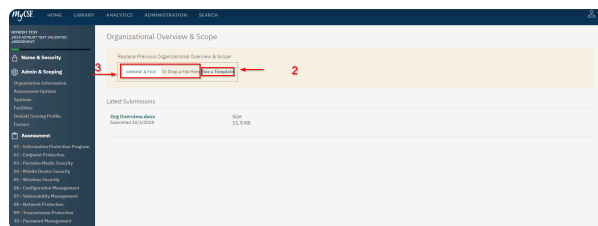
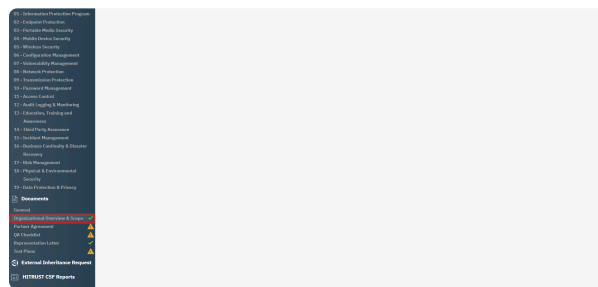
- [illegible]



9.4. Attaching the Organizational Overview and Scope

Uploading the details on the 'Scope of Your Assessment' along with the information regarding your 'Company Profile' can be placed here.

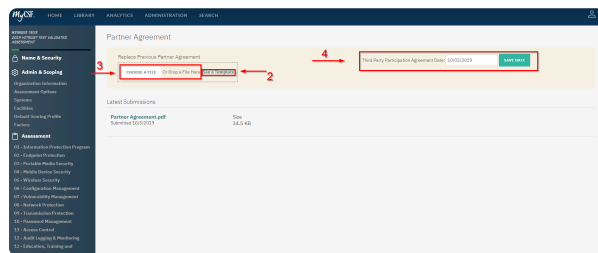
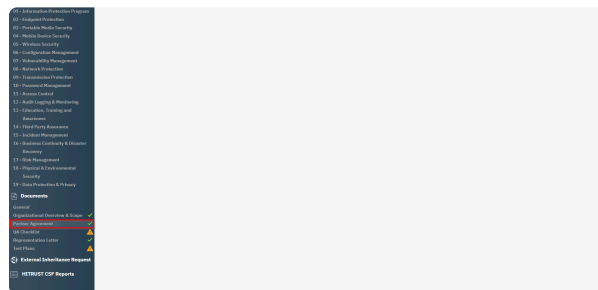
1. On the sidebar, click the 'Organizational Overview & Scope' label to be rushed to the Organizational Overview & Scope page.
2. Click on the 'See a Template' link to download the Organizational Overview & Scope Document.
3. Click on the 'Choose File' button to upload the Organizational Overview & Scope or you may 'drag and drop' the file and the document will automatically upload. Note: This file must be a '.doc'



9.5. Attaching Partner Agreement

The 'Partner Agreement' is made by and between the 'Participant' and HITRUST Services Corporations.

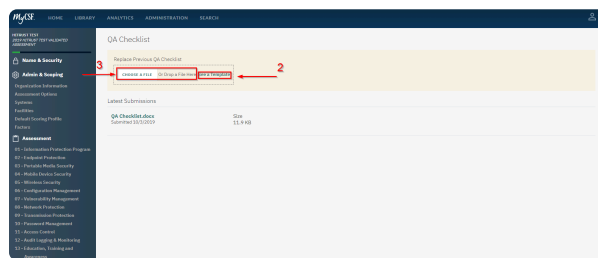
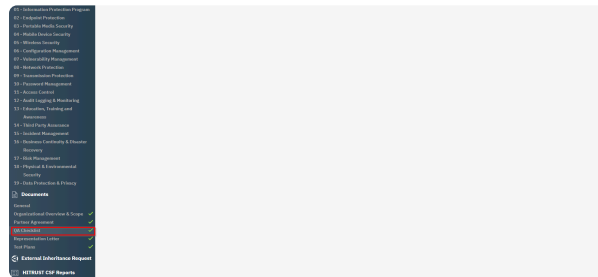
1. On the sidebar, click the 'Partner Agreement' label to be rushed to the Partner Agreement page.
2. Click on the 'See a Template' link to download the Partner Agreement.
3. Click on the 'Choose File' button to upload the Partner Agreement or you may 'drag and drop' the file and the document will automatically upload. Note: This file must be a '.pdf'
4. Lastly, provide the 'Partner Agreement Date' and click the 'Save Date' button. **Note: Please ensure that the date of this agreement is within one calendar year from current date.**



9.6. Attaching the QA Checklist

The HITRUST CSF Assessor Quality Checklist is a required Document that must be signed by the Engagement Executive and Assessor QA Resource for all Validated Assessments.

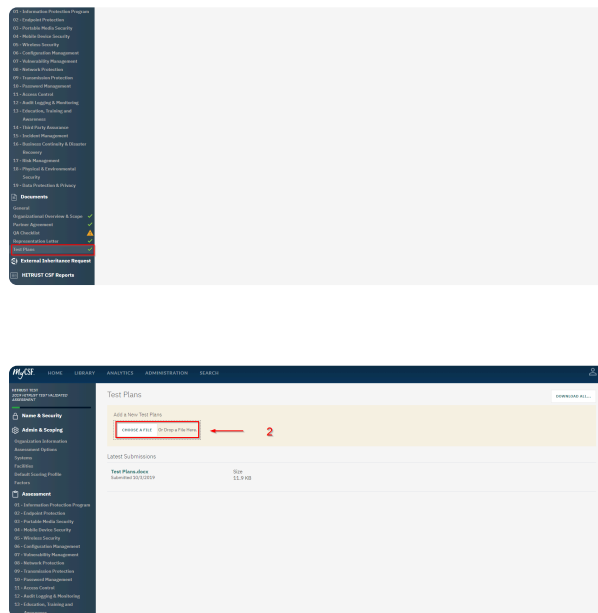
1. On the sidebar, click the 'QA Checklist' label to be rushed to the QA Checklist page.
2. Click on the 'See a Template' link to download the QA Checklist.
3. Click on the 'Choose File' button to upload the QA Checklist or you may 'drag and drop' the file and the document will automatically upload.



9.7. Attaching Test Plans

Mandatory after April 1, 2019 for all Validated Assessments, thorough Test Plans must be submitted to meet the HITRUST Requirements covering the testing of all required controls. Test plans should document with signatures, the Engagement Executive, QA Resource, and Engagement Lead for the HITRUST CSF Assessment.

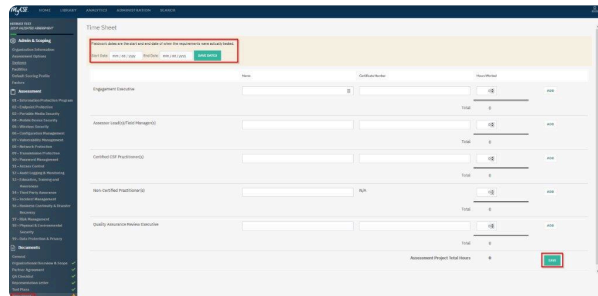
1. On the sidebar, click the 'Test Plans' label to be rushed to the Test Plans page.
2. Click on the 'Choose File' button to upload the Test Plans or you may 'drag and drop' the file and the document will automatically upload.



Link to bulletin – <https://hitrustalliance.net/content/uploads/HITRUST-CSF-Assurance-Program-Documentation-Requirements.pdf>

9.8. Assessor Timesheet

Required for all Validated Assessments, assessor organizations must record all individuals that assisted with the submission of the assessment.



External Assessor Time Sheet

1. On the sidebar, click the 'Time Sheet' label to be rushed to the Time Sheet page.
2. Enter the Name(s), Certificate Number, and Hours Worked.
3. Lastly, provide the 'Field work dates', which are the start and end date of when the requirements were actually tested and click the 'Save Date' button.





This feature is only available to assessor organizations.


10. Reservations

Starting July 1, 2021, all validated assessments within MyCSF will require that a reservation be made with our Quality Assurance team prior to submission. Completing a reservation can be done in a few simple steps.

Reservation 85

Submission Deadline 1/1/2022 	Change / Cancellation Policy Customers may change or cancel their reservation date at any time prior to submitting their assessment; however, changes or cancellations within thirty (30) days of the reservation date will incur a Change Fee. The Change Fee will be an amount equal to ten percent (10%) of the cost of the Validated Assessment Report Credit being used for this reservation. The Change Fee will be invoiced at the time of the reservation change or cancellation. If the Customer's submission is not received on or before the date of the reservation, the Customer will also be considered to have cancelled the reservation and will incur the Change Fee as noted above. The payment terms for a Change Fee will be net thirty (30) days from the date of the invoice and must be paid prior to submission of the Validated Assessment to HITRUST.
QA Block Block 2022-06 1/30/2022 - 2/5/2022	
Credit Used Credit #7386 Expires 6/18/2022	

MODIFY RESERVATION

CANCEL RESERVATION

Viewing a Reservation

Sub-topics

- [Making a Reservation](#)
- [Rescheduling/Cancelling a Reservation](#)

10.1. Making a Reservation

Reservations allow you to have more awareness into when your validated assessment will be reviewed by the HITRUST Quality Assurance team. You can set one up seamlessly within your assessment.

1. From the MyCSF Homepage, click on a validated assessment for which you'd like make a reservation.
2. On the left-hand sidebar, you will notice a "Reservations" option with a yellow caution icon. Click this icon.
 - a. If you see a red "X" instead, you will need to purchase a validated report credit. Click the "Contact HITRUST" button to notify your organization's Customer Success Manager directly from MyCSF.
3. On the "Reservations" page, click the *Get Started* button to have MyCSF navigate you through the reservation wizard.
4. The first step of the wizard will require you to choose a submission date. Your assessment **MUST** be submitted on or before this date else your assessment's reservation will be canceled. Click *Continue* when you've chosen your submission date.
5. The second step will require you to choose a QA Block. The options here will be filtered to the QA Blocks available most closely to your submission date. If you'd like to choose a timeframe that is not selectable in the results, try the date filter to have have MyCSF return the blocks relative to the date you've provided.
6. If a QA Block has no standard reservation slots left, you may see a stopwatch icon indicating that the QA Block only has Expedited slots open. These QA Blocks will require an Expedited Validated Report credit, which differs from the standard Validated Report credit. Click *Continue* to proceed.
7. After choosing your QA Block, you will need to select a Report Credit that you'd like to link to this reservation. If you only have one Report Credit usable, MyCSF will automatically select it. Click *Continue* to move to the confirmation page.
8. The final step in your reservation will be to review and confirm. On this page, you will see information pertaining to the submission deadline, QA Block, the Report Credit used as well as HITRUST's Reservation Cancellation Policy. Before your reservation is completed, you will need to agree to the Reservation Cancellation Policy by checking the box. Afterward, the *Continue* button will become enabled for you to conclude the reservation process.

RESERVATION

Make Your Reservation

In a few simple steps, MyCSF now allows you the flexibility to choose when the QA work on your Assessment will start. Click the Get Started button below to begin reserving your QA slot.

Get Started

Starting a Reservation



If your reservation is cancelled after the "Last Day" indicated on the confirmation page, you may be subject to a cancellation fee.

10.2. Rescheduling/Cancelling a Reservation

Once a reservation is made on your assessment, you are entitled to modify or cancel it. Follow the steps below to accomplish this.

1. From the MyCSF Homepage, click on the Validated Assessment for which you'd like to make a reservation.
2. On the left-hand sidebar, you will notice a "Reservations" option with a green checkmark. Click this icon.
3. Your reservation details will now be displayed on the page. At the bottom of this page are two options: *Modify Reservation* and *Cancel Reservation*.
4. If you'd like to simply update the submission date, QA Block or Report Credit associated with the reservation. click the *Modify Reservation* button. Doing so will walk you through the reservation wizard **BUT** your current reservation will not be updated until you confirm the modified reservation.
5. If you'd like to cancel the reservation completely, you can click the *Cancel Reservation* button.
6. Cancelling your reservation will return your Report Credit back to you to be used with a future reservation.

Reservation 85

<p>Submission Deadline 1/1/2022</p> <p>QA Block Block 2022-06 1/30/2022 - 2/5/2022</p> <p>Credit Used Credit #7386 Expires 6/18/2022</p>	<p>Change / Cancellation Policy</p> <p>Customers may change or cancel their reservation date at any time prior to submitting their assessment; however, changes or cancellations within thirty (30) days of the reservation date will incur a Change Fee. The Change Fee will be an amount equal to ten percent (10%) of the cost of the Validated Assessment Report Credit being used for this reservation. The Change Fee will be invoiced at the time of the reservation change or cancellation. If the Customer's submission is not received on or before the date of the reservation, the Customer will also be considered to have cancelled the reservation and will incur the Change Fee as noted above. The payment terms for a Change Fee will be net thirty (30) days from the date of the invoice and must be paid prior to submission of the Validated Assessment to HITRUST.</p> <p>Modify Reservation 12/31/2021</p> <p>Last day to cancel a reservation without penalty.</p>
---	--

MODIFY RESERVATION

CANCEL RESERVATION

Viewing a Reservation



If your reservation is cancelled after the "Last Day" indicated on the confirmation page, you may be subject to a cancellation fee.

10.2.1. Missed My Submission Date



If the submission date that is defined for your reservation passes without your assessment having been previously submitted, your reservation will be automatically cancelled. You may be issued a cancellation fee if the submission date fell after the “Last day to cancel” date that was specified for your reservation.

MyCSF will require you to rebook a reservation in order to have your assessment submitted to HITRUST.

To find the “Last day to cancel” date, you can view your reservation by clicking the “Reservation” option on the sidebar of your assessment.

Reservation 85

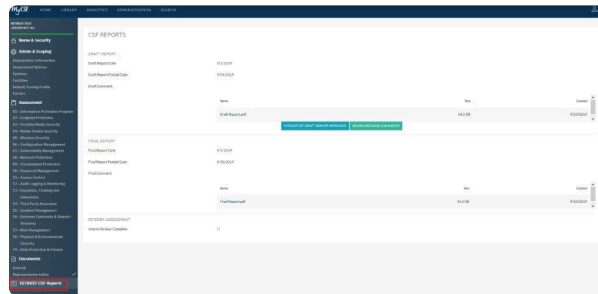
Submission Deadline 1/1/2022	Change / Cancellation Policy Customers may change or cancel their reservation date at any time prior to submitting their assessment; however, changes or cancellations within thirty (30) days of the reservation date will incur a Change Fee. The Change Fee will be an amount equal to ten percent (10%) of the cost of the Validated Assessment Report Credit being used for this reservation. The Change Fee will be invoiced at the time of the reservation change or cancellation. If the Customer's submission is not received on or before the date of the reservation, the Customer will also be considered to have cancelled the reservation and will incur the Change Fee as noted above. The payment terms for a Change Fee will be net thirty (30) days from the date of the invoice and must be paid prior to submission of the Validated Assessment to HITRUST. Modify Reservation 12/31/2021 Last day to cancel a reservation without penalty.
QA Block Block 2022-06 1/30/2022 - 2/5/2022	
Credit Used Credit #7386 Expires 6/30/2022	

 MODIFY RESERVATION
 CANCEL RESERVATION

Viewing a Reservation

11. HITRUST CSF Reports

Reports issued against the HITRUST CSF are uploaded and shared within MyCSF. Follow the steps outlined in these topics for help downloading, approving, and requesting changes for a Report.

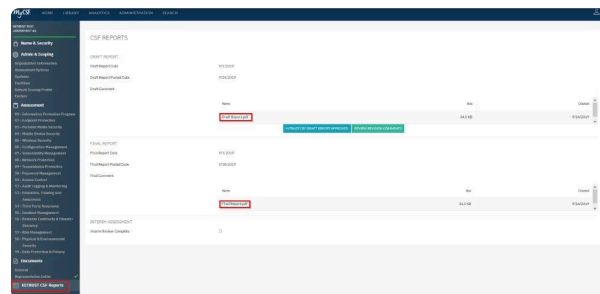
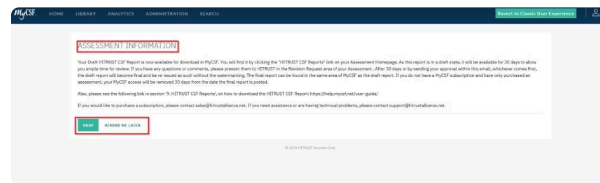


Subtopics

- [Downloading a HITRUST CSF Report](#)
- [Request a Revision for an Issued Report](#)
- [Approving a Draft Report](#)

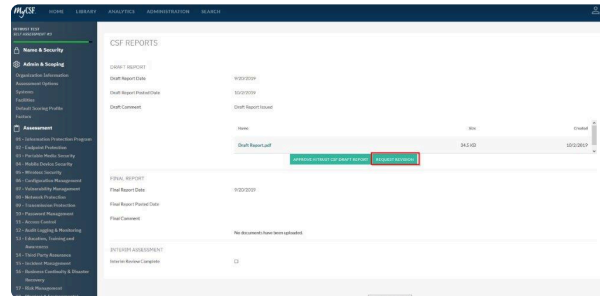
11.1. Downloading a HITRUST CSF Report

Once your HITRUST CSF Report is available for download, you will receive an automated notification from HITRUST. Your report will be available in the draft state for 30 days to allow you ample time for review.



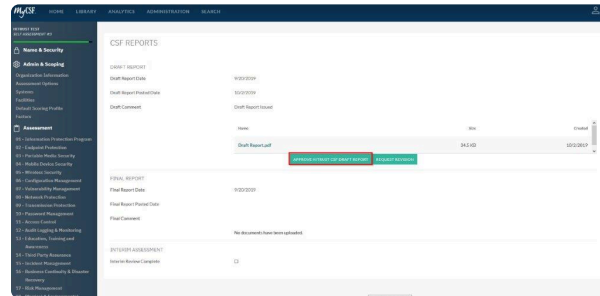
11.2. Request a Revision for an Issued Report

If you have discovered a spelling error or any type of inaccuracy in your 'Draft Report', you can request a revision by pressing the 'Request Revision' button. You will be able to place your comment in a text box that you can send to the HITRUST Assurance team.



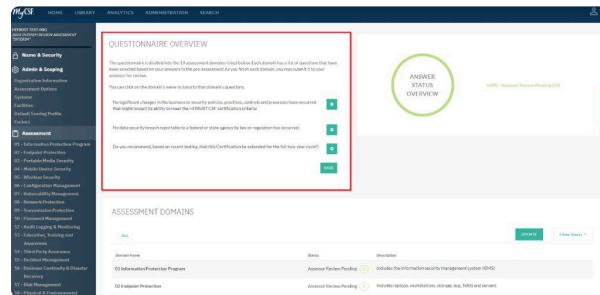
11.3. Approving a Draft Report

'Draft Reports' are automatically approved after 30 days of posting. However, you can manually approve a 'Draft Report' prior to this date by pressing 'Approve HITRUST CSF Report' button inside the HITRUST CSF Reports section. HITRUST will be notified to compile your 'Final Draft'.



12. Interim Assessment

If you are coming up on your 1-year Anniversary of your CSF Certification, you will need to perform an Interim Assessment. The Interim Assessment is to ensure that the scope of your CSF Certification is still valid. If you have a MyCSF Subscription, [click here](#) for instructions on how to perform an Interim Review using an auto-generated object. If not, [click here](#) for instructions on how to create and perform an Interim Review.



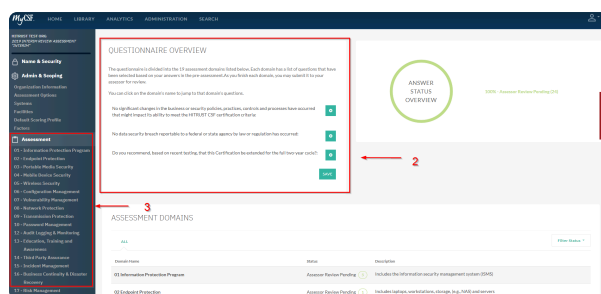
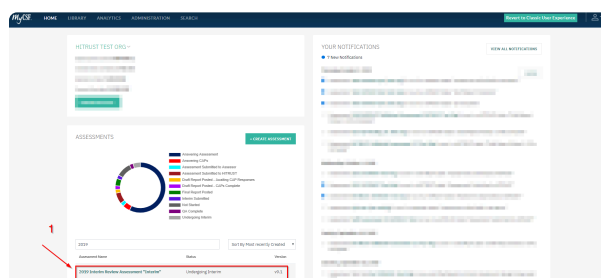
Subtopics

- [Performing an Interim Review Assessment](#)
- [Recreating Validated Assessment Object](#)

12.1. Performing an Interim Review Assessment

If you are coming up on your 1-year Anniversary of your CSF Certification, you will need to perform an Interim Assessment. The Interim Assessment is to ensure that the scope of your CSF Certification is still valid.

1. From the Homepage, click on the Assessment with the status of 'Undergoing Interim'.
2. From the Assessment Questionnaire page, you will see the Interim Assertions that will need to be Agreed to or Disagreed to.
 - a. Agree- Clicking the Assessor Agreement icon once.
 - b. Disagree- Clicking the Assessor Agreement icon twice. **Note- If you disagree, the CSF Certification will not be allowed to continue.**
3. Once you have saved the Interim Assertions, go to any of the 19 Assessment Domains to begin your review. After saving the Interim Assertions, you may now begin reviewing the Statements that are included in this Assessment. Click the name of a Domain for which you would like to complete.
4. From the Assessment Domain, expand the Assessment Statement and start your review. You must either Agree or Disagree that the Assessment Statement is in place and effective. If the maturity levels now vary from the original score you may adjust them accordingly.
5. For any identified CAP, please ensure the status is current, and where appropriate, mark the completion date of the mitigation plan.
6. Once you have completed the review of the selected Interim Assessment Statements and the status of any identified CAPs, you may now submit the Interim Assessment to HITRUST.



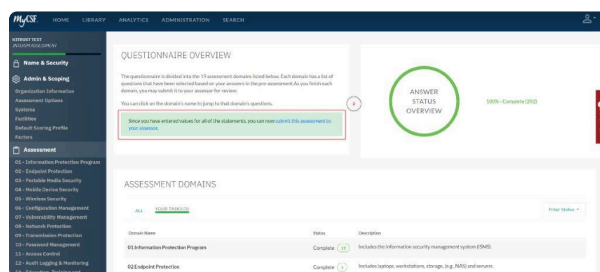
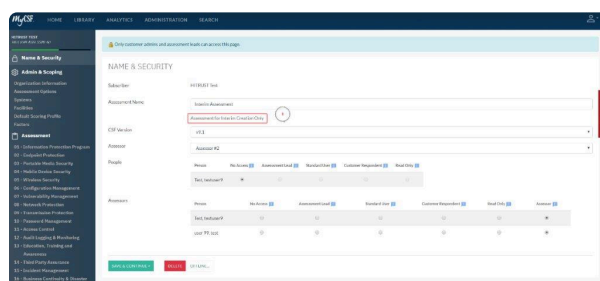


12.2. Recreating a Validated Assessment Object

Once an Interim Assessment has been provisioned, please note that you will have to answer all the Pre-Assessment and Assessment Questionnaire identical to your CSF Certification.

✿ If you still have access to the Original Certified Assessment Object, you do not need to follow the steps below. [Click here](#) for instructions to begin your review for an Interim Assessment

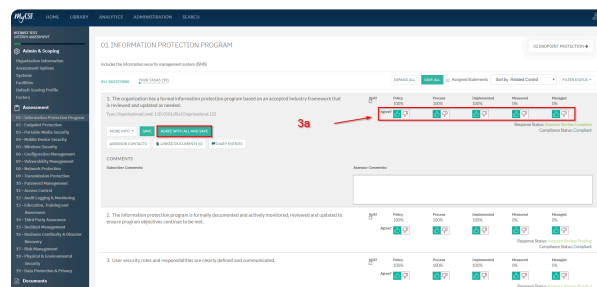
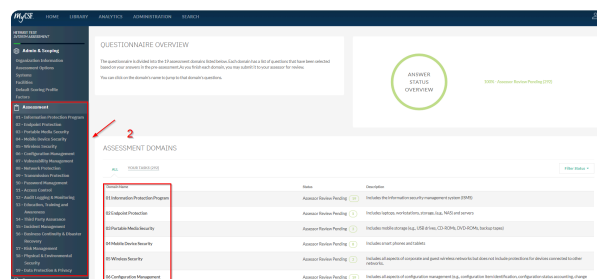
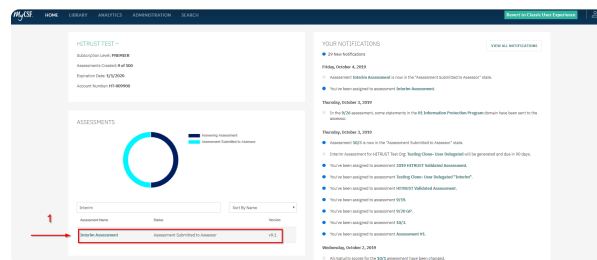
1. From the Homepage, click the Assessment that has been provisioned to mirror your Certified Validated Assessment. If you are uncertain of the Assessment Name, click the 'Name & Security' page (Shield Icon) and look for the designation "Assessment for Interim Creation Only". Please note that as you begin answering the Pre-Assessment and Assessment Questionnaire, your answers must match your Original CSF Certification. To ensure accuracy, please refer back to your Certification Report. **For guidance, go to Section- [5. Pre-Assessment](#)**
2. Once you have completed the Pre-Assessment and Assessment Questionnaire, you may now submit the Assessment to your Assessor for Validation.



12.2.1. Re-validating the Assessment

As you would in any Validated Assessment, you as the Assessor will need to validate all of the Assessment Questions completed by your Client. You will have to ensure the maturity scores entered are identical to their Original CSF Certification.

1. From the Homepage, click the Assessment that has been submitted to you for Validation.
2. From the Assessment Questionnaire page, go to any of the 19 Assessment Domains to begin your review. **Note- that the maturity scores entered must match your client's original CSF Certification. To ensure accuracy, please refer back to your client's Certification Report.**
3. From the Assessment Domain, expand the Assessment Statement and start your validation. You must either Agree or Disagree to each maturity level.
 - a. Agree- Clicking the 'Agree with all and save' button **OR** click the Assessor Agreement icon once.
 - b. Disagree- Clicking the Assessor Agreement icon twice. **Note- If you disagree, you must provide a comment and a suggested score for your client.**
4. Once you have completed validating the Assessment Statements, you may now generate the CAPs for your client's Interim Assessment.



The screenshot shows the 'Questionnaire Overview' page. The page title is 'QUESTIONNAIRE OVERVIEW'. Below the title, there is a paragraph explaining that the questionnaire is divided into 10 assessment domains and that each domain has a list of questions. A red box highlights the 'Information Protection Program' domain, which is marked as 'Completed'. A red arrow points to this domain. To the right, there is a green circular graphic with the text 'ANSWER STATUS OVERVIEW' and a small '100% Completed' indicator.

QUESTIONNAIRE OVERVIEW

The questionnaire is divided into the 10 assessment domains listed below. Each domain has a list of questions that have been created for you. In your answer to these questionnaire items, you have 30 minutes to answer each question.

Please click on the domain you want to answer to find domain questions.

Stop on this overview if you are not permitted to click on the domain questions

ANSWER STATUS OVERVIEW 100% Completed

Assessment

- Information Protection Program
- Information Security
- Physical Security
- Personnel Security
- Operational Security
- Business Process Management
- Business Continuity Management
- Network Security
- Security Management
- Security Awareness

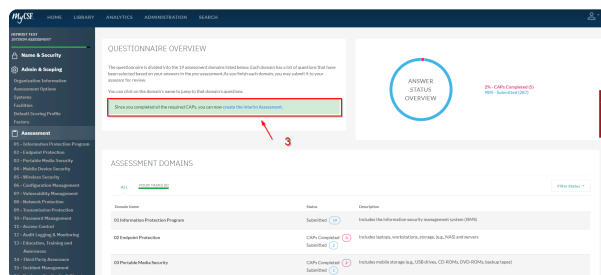
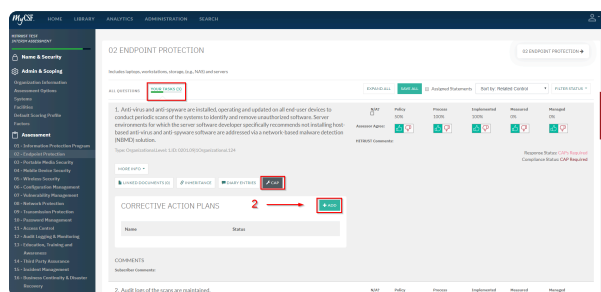
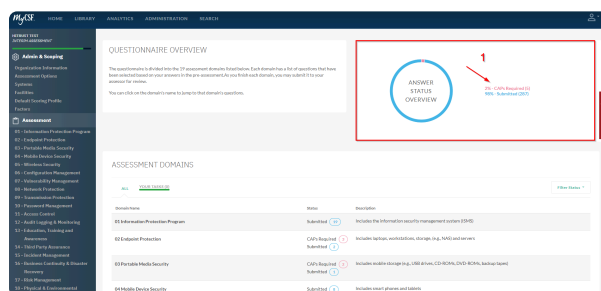
Assessment Domains

Assessment Domain	Status	Questions
Information Protection Program	Completed	1
Information Security	Completed	1
Physical Security	Completed	1
Personnel Security	Completed	1
Operational Security	Completed	1
Business Process Management	Completed	1
Business Continuity Management	Completed	1
Network Security	Completed	1
Security Management	Completed	1
Security Awareness	Completed	1

12.2.2. Answering CAPs & Generating an Interim Assessment

If you had CAPs identified within your Original CSF Certification, you will have to add the same corrective action plan identical to your Original CSF Certification. If you do not have any mandatory Corrective Action Plans, you can immediately generate the Interim Assessment outlined in Step Three.

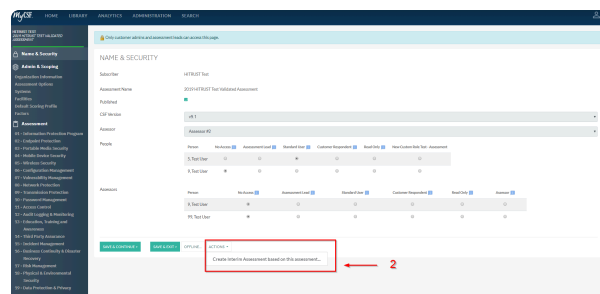
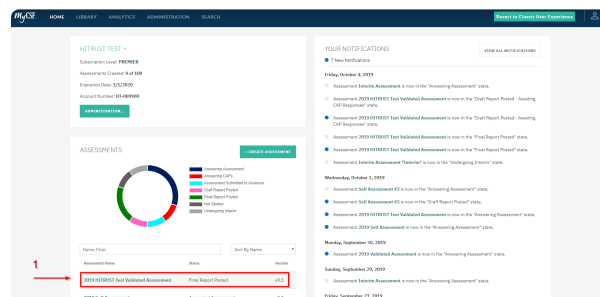
1. On the Homepage of your Assessment, you will see that the 'Answer Status Summary' has been updated with CAPs Required.
2. From the Assessment Domain, click the 'Your Tasks' tab and click the first Assessment Domain and Statement to add a CAP. **For guidance, go to Section- [6.1.2.5. Adding Corrective Action Plans](#)**
3. Once you have completed the Required CAPs, you may now generate the Interim Assessment.
4. On the Homepage, you will see that the Interim Assessment has been generated with the status of 'Undergoing Interim'. **For guidance on how to perform an Interim Assessment, go to Section- [10.1 Performing an Interim Review Assessment](#)**



12.3. Manually Generating an Interim Assessment

If you are coming up on your 1-year Anniversary of your CSF Certification and have a MyCSF Subscription, please note that your Interim Assessment will auto-generate 90 days prior to the Anniversary of the Certification Date of your Original Assessment. If you wish to start on the Interim prior to its auto-generation, you can do so by following the instructions below. Please know, the Interim can only be created if the CSF Certification is no more than 120 days away.

1. From the Homepage, click on the Certified Assessment that you wish to create a subsequent Interim Assessment. **Note- It cannot be generated more than 120 days prior to the Anniversary of the Certification.**
2. From the Assessment Questionnaire page, you may generate the Interim Assessment from the 'Questionnaire Overview' section or going to the Name & Security page. From the Name & Security, scroll to the bottom of the page and click on the 'Actions' drop-down and click 'Create Interim Assessment based on this assessment...'
3. On the Homepage, you will see that the Interim Assessment has been generated with the status of 'Undergoing Interim'. **For guidance on how to perform an Interim Assessment, go to [Section- 10.1 Performing an Interim Review Assessment](#)**



[illegible]

13. Internal Assessors

Organizations, that are capable of demonstrating proficiency within their Internal Audit departments, are permitted to test their own Requirement Statements and enable their External Assessor to rely on the results. [Click here to learn more.](#)

Sub-topics

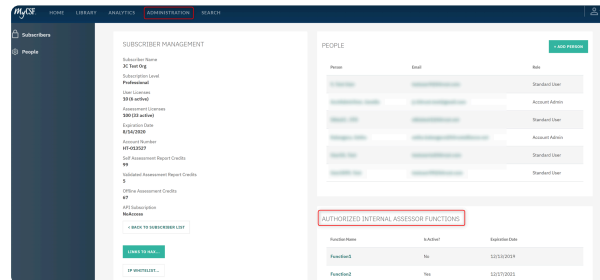
- [Applying to be an Internal Assessor](#)
- [Viewing your Internal Assessor Functions](#)
- [Configuring a User as a HITRUST CSF practitioner](#)
- [Enabling Internal Assessors On Your Assessment](#)
- [Assigning Internal Assessors to an Assessment](#)
- [Answering Requirement Statements](#)
- [Completing your Internal Assessor Time Sheet](#)

13.1. Applying to be an Internal Assessor

Internal Assessors are those personnel who facilitate the CSF Assessment process by performing in-house testing in advance of an External Assessor's validated assessment fieldwork. Internal Assessors are part of an "Internal Assessment Function." This function will typically be an Internal Audit Department or a team of consultants but is not required to be if specific objectivity, competence, and application approval requirements are met. [Click here to apply.](#)

13.2. Viewing your Internal Assessor Functions

Easily Accessible from your Administration, you are able to view all of the approved Internal Assessor functions. The individual IA Function pages will include the approved application, a status, an expiration date, and the Assessments in MyCSF that have leveraged this function.

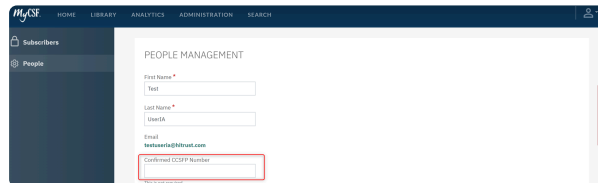


Authorized Internal Assessor Functions

13.3. Configuring a User as a HITRUST CSF practitioner

A requirement of the Internal Assessor program is that all users performing Internal Assessor duties must be an active HITRUST CSF Certified Practitioner (CCSFP). In order to have a user validated as a CCSFP, the Account Administrator from your organization must provide your Confirmed CCSFP Number.

1. From the Homepage, click the 'Administration' button at the top Menu bar or below your Subscription Information.
2. From the Subscriber Management page, click the name of the user you wish to configure as a CSF Practitioner.
3. From that users People Management page, enter the Confirmed CCSFP Number.
4. Lastly, click the 'Save' button to save the Confirmed CCSFP Number. MyCSF will verify if the users CCSFP Number is valid and matches the user's Email Address.

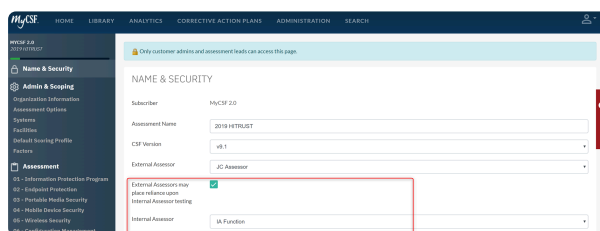
A screenshot of the MyCSF web application interface. The top navigation bar includes 'HOME', 'LIBRARY', 'ANALYTICS', 'ADMINISTRATION', and 'SEARCH'. A left sidebar shows 'Subscribers' and 'People' options. The main content area is titled 'PEOPLE MANAGEMENT' and contains a form with fields for 'First Name', 'Last Name', 'Email', and 'Confirmed CCSFP Number'. The 'Confirmed CCSFP Number' field is highlighted with a red rectangular box. Below this field, there is a small red error message that reads 'This is a required field'. The email address 'testuser@hitrust.com' is visible in the 'Email' field.

Confirmed CCSFP Number

13.4. Enabling Internal Assessors On Your Assessment

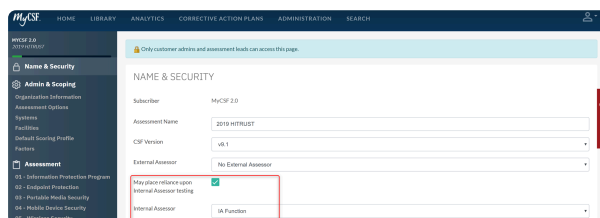
After your Internal Assessor application has been approved, the Name and Security page on your Organization's Assessment will be altered to include a checkbox allowing you to mark your Assessment as having been tested by Internal Assessors. When selected, you will be required to choose the appropriate IA Function that is responsible for working on the Assessment.

1. From the Name and Security page, once an External Assessor firm has been selected, press the **'External Assessors may place reliance upon Internal Assessor testing'** checkbox. If an External Assessor firm is not selected, press the **'May place reliance upon Internal Assessor testing'** checkbox right below the External Assessor drop-down list.
2. Once checked, a drop-down list will appear for you to select your approved Internal Assessor.



The screenshot shows the 'NAME & SECURITY' page in the MyCSF 2.0 interface. The 'External Assessor' dropdown is set to 'JC Assessor'. The checkbox 'External Assessors may place reliance upon Internal Assessor testing' is checked. The 'Internal Assessor' dropdown is set to 'IA Function'.

External Assessor placing reliance on Internal Assessor testing

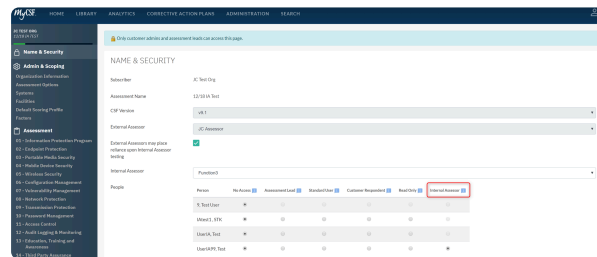


The screenshot shows the 'NAME & SECURITY' page in the MyCSF 2.0 interface. The 'External Assessor' dropdown is set to 'No External Assessor'. The checkbox 'May place reliance upon Internal Assessor testing' is checked. The 'Internal Assessor' dropdown is set to 'IA Function'.

Placing reliance on Internal Assessor testing

13.5. Assigning Internal Assessors to an Assessment

If an Internal Assessor Function has been chosen for an Assessment (Link to Enabling Internal Assessors On Your Assessment), the Subscriber People table will be augmented to include a new column that is reserved for Internal Assessors. Those that have been delegated this permission are able to perform all Internal Assessor duties on the Assessment.



Assigning Internal Assessor

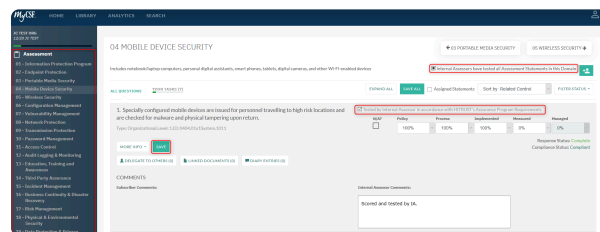


Can't select a user? Ensure they have been appropriately setup as a HITRUST CSF Practitioner user.

13.6. Answering Requirement Statements

By Default, all Requirement Statements will be inherently owned by Management. If you wish to provide the scoring as an Internal Assessor, you can either designate individual Requirement Statements or entire Assessment Domains as having be addressed by an Internal Assessor. Doing so will make the Requirement Statements editable by you and read-only for Management.

1. From the Assessment Questionnaire page, go to any of the 19 Assessment Domains to begin your testing.
2. A list of your Requirement Statements will appear; select one that you would like to answer. Once picked, it will expand and expose the attributes that can be modified.
3. Once expanded, press the **'Tested by Internal Assessor in accordance with HITRUST's Assurance Program Requirements'** checkbox above the maturity inputs to designate individual Statement(s) to be tested by an IA. If you are wishing to designate the entire domain to be tested by an IA, then simply press the **'Internal Assessors have tested all Assessment Statements in this Domain'** checkbox atop of the domain.
4. Use the five maturity inputs on the right half of the page to complete the Requirement Statement(s). Provide any wanted commentary in the text area beneath the maturity drop-downs.
5. Press 'Save'.

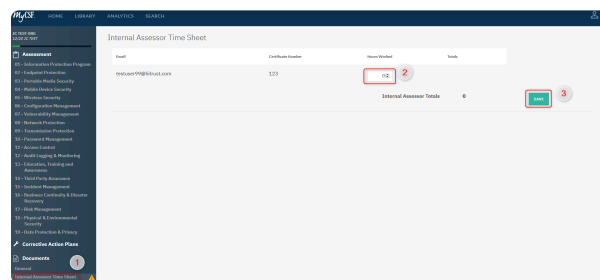


Tested by Internal Assessor

13.7. Completing your Internal Assessor Time Sheet

Like External Assessors, Internal Assessors are obligated to document both the individuals who performed Internal Assessor duties on the Assessment as well as the hours they each committed.

1. On the sidebar, click the 'Internal Assessor Time Sheet' label to be rushed to the Internal Assessor Time Sheet page.
2. Enter the Hours Worked for this Assessment. You will notice that your Email and Certificate Number has been auto-populated into the Time Sheet.
3. Lastly, click the 'Save' button.



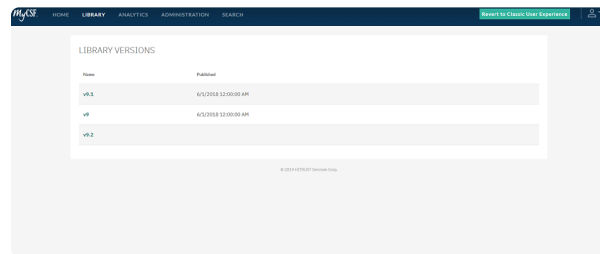
Internal Assessor Time Sheet



This feature is only available if your organization is placing reliance upon internal testing on a Validated Assessment.

14. Library

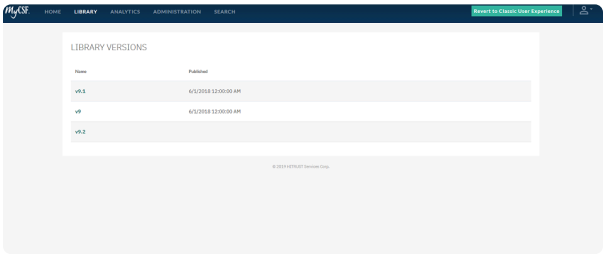
Located at the top of the Menu bar, the **Library** can be viewed and/or exported as a template, based on the any of your downloaded versions. You can interact with the **HITRUST CSF** in a top to bottom structure starting from the **Control Category**, **Control Objective**, **Control Reference**, to **Control Level**.



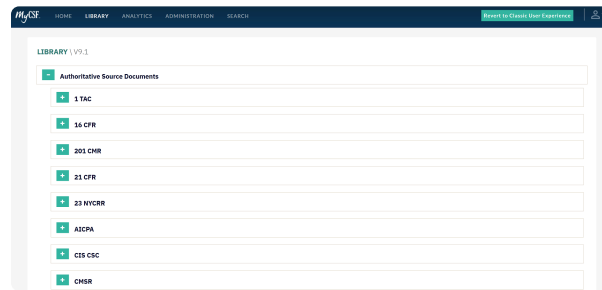
1. After authenticating through the HITRUST Portal, click on Library in the top Menu bar.
2. Choose a Library version you wish to view and/or alter the contents of, stored on your network.
3. Expand each of the links to view details and edit for [Authoritative Source Documents](#), [Factor Categories](#), [CSF Control Categories](#), and more.

14.1. Viewing the Library

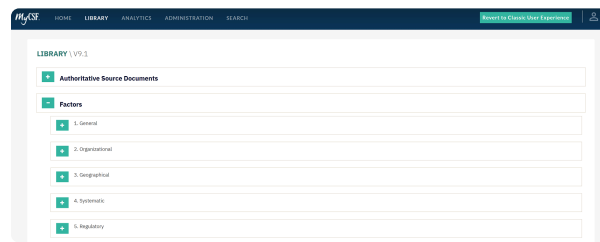
The HITRUST CSF is a comprehensive and prescriptive framework that can be scaled and tailored based on an organization’s type, size and complexity. This library will include the most interactive and up-to-date source for the HITRUST CSF.



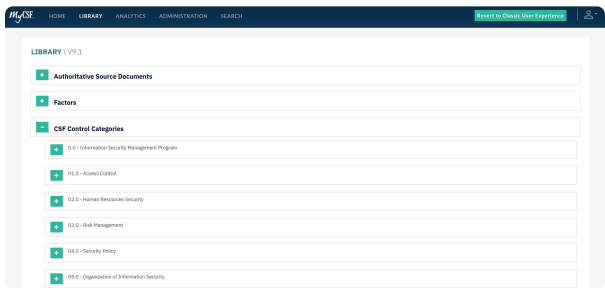
14.1.1. Authoritative Source Documents



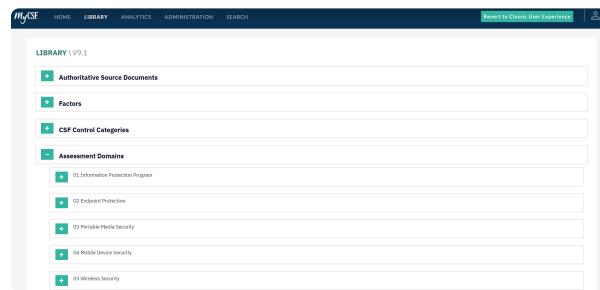
14.1.2. Factor Categories



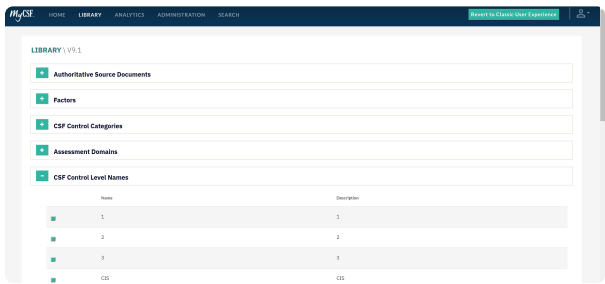
14.1.3. CSF Control Categories



14.1.4. Assessment Domains

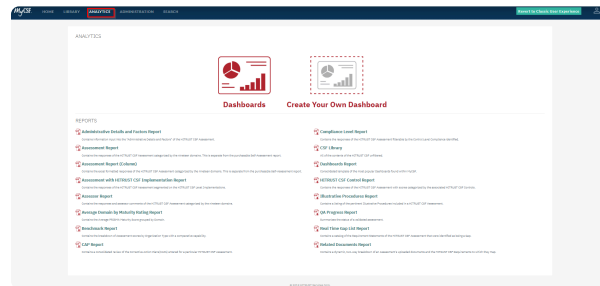


14.1.5. CSF Control Level Names



15. Analytics

The **'Analytics'** feature complements **'MyCSF'** by delivering extensive and practical information about your Assessments in a multitude of venues ranging from viewing your [Avg Maturity Scores](#) per Assessment, [Benchmarking](#) scores with other organizations for compare and contrast, reviewing each of your assessments [Scoping Information](#) and more. You will also have the opportunity to download documents in either PDF or Excel format regarding [Illustrative Procedures](#), [CSF Library](#), [CAP Report](#) and more.



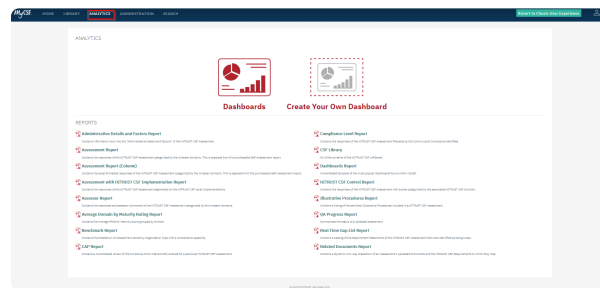
1. After authenticating through the HITRUST Portal, click on **'Analytics'** in the top Menu bar.



Only those with a subscription will be able to view the Dashboards and Reports modules of Analytics.

15.1. Dashboards

Our **Dashboards** module holds a treasure trove of unique features applicable to all of your Assessments from the MyCSF 2.0 application. Use the **Dashboards** component to construct charts that will disclose data in conjunction with your information entered among each of your Assessments, including but not limited to; **Responses and Results**, **CAP Report**, **Residual Risk**, **Exporting the CSF Library**, as well as **GAP Status** and **Residual Risk Rating** records.

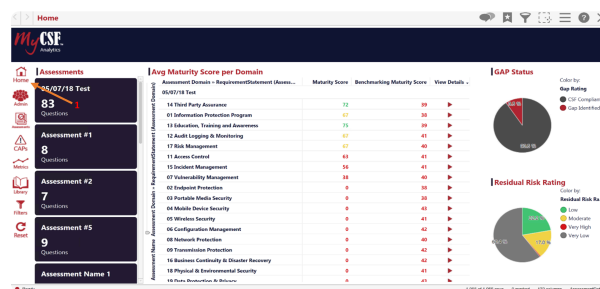


1. After authenticating through the HITRUST Portal, click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).

15.1.1. Home

Here you will see your total '**Assessments**', '**Avg. Maturity Score per Domain**', as well as your '**Gap Status**', and '**Residual Risk Rating**' charts.

- **Home** – Here is the homepage you will automatically arrive at upon selecting [Dashboards](#).
 - **Assessments** – Click on one your assessment to render the information related to this object in the page. Click and drag the mouse to select two or more of your assessments.
 - **Clarification** – Clarify the maturity scores of your chosen Assessment(s) by leveraging the filter down for '**Average by Domain**' or '**Average by Requirement Statement**'.
 - **Avg. Maturity Score per Domain** – View each of your domains that have been completed within your scope and each of their average maturities.
 - **Assessment Details** – Click on one of your domains '**Assessment Details**' and view the '**Maturity Scores**' by Statement in each of your domains.
 - **GAP Status** – View your '**GAP Status**' chart and see how your domain(s) split between '**Compliant**' and '**GAP's Identified**'.
 - **Residual Risk Rating** – View the risk you carry from '**Very high**' to '**Very Low**' in each of your domain(s).



Dashboards, Home

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#) to be taken to the '**Home**'.

15.1.2. Admin

Under the '**Admin**' tab, you can view each Assessment's [Administrative and Scoping](#) inputs under this subscription. Click on each function at the top of the page to access one.

- **Admin** – This option allows you to review the [Pre-Assessment](#) information such as, [Organization Information](#), [Assessment Options](#), [Factors](#), [Systems](#), and [Facilities](#).
 - **Select an Assessment** – Choose one of your Assessments under this subscription in the dropdown.
 - [Administrative Details](#) – View your '**Organization Information**' and '**Assessment Options**' inputs.
 - [Factors](#) – View your '**General**', '**Organizational**', '**Regulatory**', '**Geographical**', and '**Systematic**' inputs.
 - [Systems](#) – View your '**System Name**' and '**Values**' inputs.
 - [Facilities](#) – View your '**Facility Name**' and '**Values**' inputs.

The screenshot shows the 'Administrative Details' form in the MyCSF 2.0 Admin interface. The form is titled 'Administrative Details (MyCSF 2.0 Demo)' and is divided into four main sections: 'Organization Information', 'Contact Information', 'Organization Profile', and 'Environment'. A red arrow points to the 'Select an Assessment' dropdown menu in the top left corner of the form.

Organization Information	
Contact Name:	John Doe
Contact Title:	Analyst
Contact Email:	john.doe@hitrust.com
Contact Phone (1):	123 456 7890
Contact Phone (2):	

Organization Profile	
Name of the Organization:	ABC Factory
Location(s) of the Organization:	USA
Primary Mailing Address:	ABCFactory@ABCFactory.com
Organization Summary:	We provide goods and services around the world.
Number of Employees:	50

Please provide a description of the security organization including key

Admin

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Admin**' in the left Nav bar.

15.1.2.1. Administrative

View your [Organization Information](#) and [Assessment Options](#) inputs. This is the information you entered in your Assessment under the [Administrative & Scoping](#) section of 'MyCSF'.

The screenshot shows the 'Administrative Details' page in the MyCSF portal. The page has a dark blue header with the MyCSF logo and navigation links. A sidebar on the left contains various icons, with the 'Admin' icon highlighted by a red arrow labeled '1'. The main content area has a red header with 'Administrative Details | Factors | System | Facilities'. Below this, there's a section titled 'Administrative Details (MyCSF 2.0 Demo)' with a dropdown menu. The main content area is divided into three sections: 'Organization Information', 'Organization Profile', and 'Environment'. The 'Organization Information' section contains a table with contact details. The 'Organization Profile' section contains a table with organizational details. The 'Environment' section is currently empty.

Organization Information	
Contact Name:	John Doe
Contact Title:	Analyst
Contact Email:	JohnDoe@HITRUST.com
Contact Phone (1):	123-456-7890
Contact Phone (2):	

Organization Profile	
Name of the Organization:	ABC Factory
Location(s) of the Organization:	USA
Primary Mailing Address:	ABCFactory@ABCFactory.com
Organization Summary:	We provide goods and services around the world.
Number of Employees:	50

Environment	
-------------	--

Administrative Details

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Admin' in the left Nav bar.
4. You will be automatically taken to the 'Administrative Details' on the top of the page.

15.1.2.2. Factors

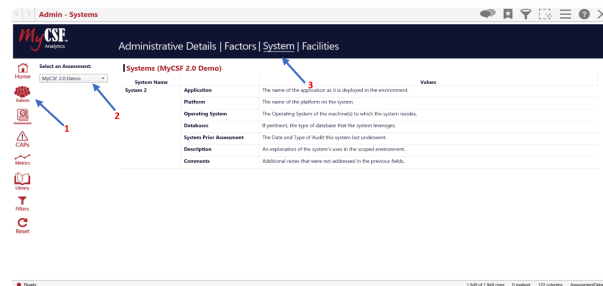
View your [Factor](#) inputs. This is the information you entered in your Assessment under the [Administrative & Scoping](#) section of 'MyCSF'.

Factors

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Admin' in the left Nav bar.
4. Next, click on 'Factors' on the top portion of the page.

15.1.2.3. Systems

View your [System](#) inputs. This is the information you entered in your Assessment under the [Administrative & Scoping](#) section of 'MyCSF'.

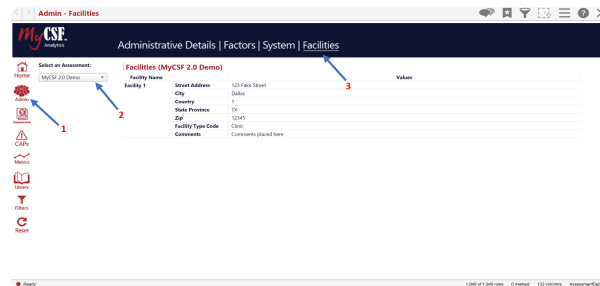


Systems

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Admin' in the left Nav bar.
4. Next, click on 'Systems' on the top portion of the page.

15.1.2.4. Facilities

View your [Facility](#) inputs. This is the information you entered in your Assessment under the [Administrative & Scoping](#) section of 'MyCSF'.



Facilities

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Admin' in the left Nav bar.
4. Next, click on 'Facilities' on the top portion of the page.

15.1.3. Assessments

Here in the '**Assessments**' tab, view statistics about each '**Assessment Statement**' you have entered, and the relevant actions during '**Completing an Assessment**' you may or may have not placed alongside it. Review your '**Assessments**', '**Compliance**', '**Residual Risk**', '**Compliance & Procedures**', and '**Documents & Other**'.

- **Assessments** – Find all the information you have partnered with your statements when you '**Completed your Assessments**'.
 - **Assessments** – View your Assessment Result in detail and view the maturity scores by Statements in each of your domains.
 - **Compliance** – View your Control Information in tandem with your CSF compliance levels.
 - **Residual Risk** – View the risk you carry in each Assessment by domain as well as Compliance per CSF Statement.
 - **Compliance & Procedures** – View your Illustrative Procedures for each of your Domains and the values used to assess them.
 - **Documents & Other** – View the the Documents that have been uploaded and to which statements they have been applied to within your Assessment.



Assessments

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Assessments**' in the left Nav bar.

15.1.3.1. Assessments

Check out each Assessment under your subscription with all of the data applicable to your Assessments under the categories '**High Level**', '**Responses**', '**Results**', '**Comparisons**', '**Diary**', '**Users**', '**Sources**'.

- **Assessments** – View your Assessment Result in detail and view the maturity scores by Statements in each of your domains.
 - **High Level** – Review each domains '**Avg Maturity Scores**' with '**Response Status**' and '**Gap Rating**'.
 - **Status** – Look at all of the responses held in your Assessment by '**Status Filter**'.
 - **Results** – Find all of the values placed of each completed Statement.
 - **Comparisons** – Compare any one of your Assessments side by side referencing each of their maturity scores by domain name.
 - **Diary** – Glance through any of the available dialogue created between your Assessor and that respective user for any Statement.
 - **Users** – Discover any user who has been '**Assigned a Statement**' and track their progress for that task.
 - **Sources** – View each of the '**Authoritative Sources**' within the '**Scope of your Assessment**'.



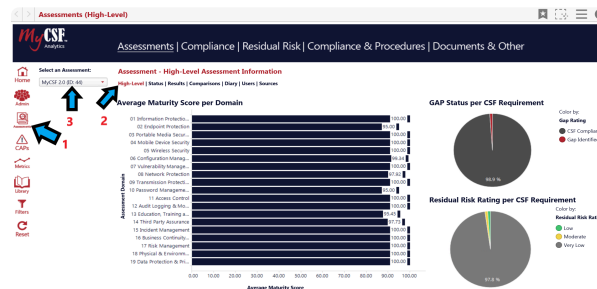
Assessments

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Assessments**' in the left Nav bar.
4. Click on the '**Assessments**' category at the top of the page.

15.1.3.1.1. High Level

View your chosen Assessment at the highest '**Avg Maturity Level**' available, accompanied by two interactive charts relating to your Assessment's '**Status Filters**' and '**GAP Status**' for your Statements.

- **Assessments** – View your Assessment Result in detail and view the maturity scores by Statements in each of your domains.
 - **High Level** – Review each domains '**Avg Maturity Scores**' with '**Response Status**' and '**Gap Rating**'.



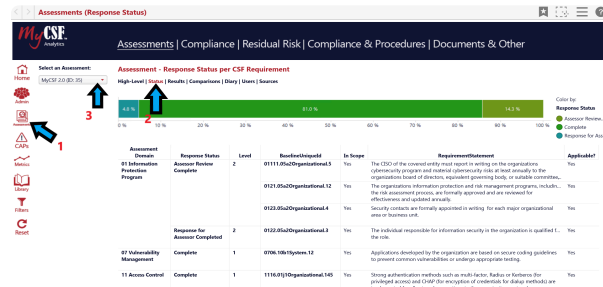
High Level

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Assessments**' in the left Nav bar.
4. Click on the '**Assessments**' category at the top of the page.
5. Now choose '**High Level**' in the header just below the categories.

15.1.3.1.2. Status

View your chosen Assessment by **'Status'** to further clarify how fast your Assessment is moving in either the **'Self-Assessment'**, **'Validated Assessment'** or **'Targeted Assessment Process'**.

- **Assessments** – View your Assessment Result in detail and view the maturity scores by Statements in each of your domains.
 - **Status** – Look at all of the responses held in your Assessment by **'Status Filter'**.



Status

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'Assessments'** in the left Nav bar.
4. Click on the **'Assessments'** category at the top of the page.
5. Now choose **'Status'** in the header just below the categories.

View your chosen Assessment by **'Results'** along with **'Response Status'**, **'Implementation Level'**, and **'Applicability'**.

- [illegible]

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Assessments**' in the left Nav bar.
4. Click on the '**Assessments**' category at the top of the page.
5. Now choose '**Results**' in the header just below the categories.

15.1.3.1.4. Comparisons

Compare your Assessments and create your own observations between maturity scores and on where your security stands per Domain, or Statement.

- **Assessments** – View your Assessment Result in detail and view the maturity scores by Statements in each of your domains.
 - **Comparisons** – Compare any one of your Assessments side by side referencing each of their maturity scores by domain name.

Assessment Domain	Requirement Statement	Policy	Process	Implemented	Measured	Managed	Maturity Score
01 Information Protection Program	The individual responsible for information security in the organization is specified for the role.	50.00	25.00	50.00	25.00	50.00	40.00
	The organization ensures local responsibilities for the protection of assets and for carrying out specific...	50.00	25.00	50.00	25.00	50.00	40.00
	The organization has a formal information protection program based on an accepted industry framework that...	50.00	25.00	50.00	25.00	50.00	40.00
02 Portable Media Security	Media is labeled, encrypted, and handled according to its classification.	75.00	75.00	75.00	75.00	75.00	75.00
	The organization, based on the data classification level, registers media (including laptops) prior to use, phone...	100.00	100.00	100.00	25.00	50.00	83.75
06 Configuration Management	Annual compliance reviews are conducted by security...	25.00	75.00	50.00	50.00	50.00	50.00
	with individuals using remote or external tools. If...	50.00	25.00	50.00	25.00	50.00	40.00
07 Vulnerability Management	Applications developed by the organization are based on secure coding guidelines to prevent errors.

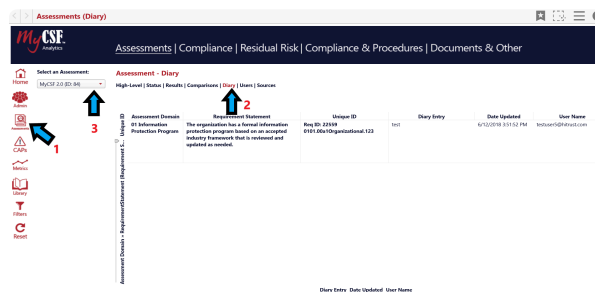
Comparisons

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Assessments' in the left Nav bar.
4. Click on the 'Assessments' category at the top of the page.
5. Now choose 'Comparisons' in the header just below the categories.

15.1.3.1.5. Diary

Review your '**Diary Entries**' and what you and your Assessor have conversed about regarding any Statement that you can your Assessor have spoken about. This is a useful feature for record keeping all on your '**Diary**' function.

- **Assessments** – View your Assessment Result in detail and view the maturity scores by Statements in each of your domains.
 - **Diary** – Glance through any of the available dialogue created between your Assessor and that respective user for any Statement.



Diary

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Assessments**' in the left Nav bar.
4. Click on the '**Assessments**' category at the top of the page.
5. Now choose '**Diary**' in the header just below the categories.

15.1.3.1.6. Users

View all of the users that been **'Assigned a Statement'** and take a look if a user has completed or has not started the Statements assigned to him/her.

- **Assessments** – View your Assessment Result in detail and view the maturity scores by Statements in each of your domains.
 - **Users** – Discover any user who has been **'Assigned a Statement'** and track their progress for that task.



Users

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'Assessments'** in the left Nav bar.
4. Click on the **'Assessments'** category at the top of the page.
5. Now choose **'Users'** in the header just below the categories.

View the Authoritative Sources to any one of your Assessments and browse through the page to find those that match any of your Statements.

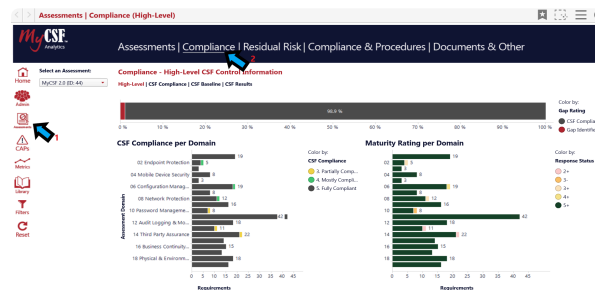
- [illegible]

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Assessments**' in the left Nav bar.
4. Click on the '**Assessments**' category at the top of the page.
5. Now choose '**Sources**' in the header just below the categories.

15.1.3.2. Compliance

Under the **'Controls'** category, find all of your domains maturity scores by **'CSF Compliance'**, **'CSF Baseline'**, and **'CSF Results'**.

- **Controls** – Find all of your data sorted by control level and sifted down to individual Statements.
 - **High Level** – View your maturity scores by domain level as well as each of their compliance levels.
 - **CSF Compliance** – Manipulate the bar graph provided and glance at your positions you face concerning your Statements **'CSF Compliance Status'**.
 - **CSF Baseline** – Search any details on your Statements catered by any baseline filter you like.
 - **CSF Results** – Review all of the **'Values'** you have provided and reference any material concerning your Statements **'CSF Baseline'**.



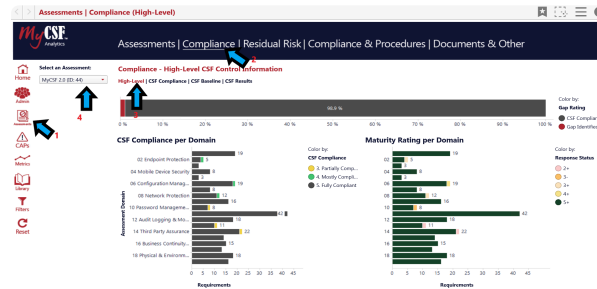
High Level

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'Assessments'** in the left Nav bar.
4. Click on the **'Controls'** category at the top of the page.

15.1.3.2.1. High Level

View your chosen Assessment at the highest 'CSF Compliance per Domain' available, partnered with 'Maturity Rating per Domain' for your Statements.

- **Compliance** – Find all of your data sorted by control level and sifted down to individual Statements.
 - **High Level** – Review charts and alter sections of it for 'CSF Compliance per Domain' and 'Maturity Rating per Domain'.



High Level

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Assessments' in the left Nav bar.
4. Click on the 'Compliance' category at the top of the page.
5. Now choose 'High Level' in the header just below the categories.

15.1.3.2.2. CSF Compliance

View your chosen Assessment by 'CSF Compliance' rate and compare them to those that are 'Fully Compliant', 'Partially Compliant', or 'Not Compliant' Statements.

- **Compliance** – Find all of your data sorted by control level and sifted down to individual Statements.
 - **CSF Compliance** – Manipulate the bar graph provided and glance at your positions you face concerning your Statements **CSF Compliance Status**.



CSF Compliance

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Assessments' in the left Nav bar.
4. Click on the 'Compliance' category at the top of the page.
5. Now choose 'CSF Compliance' in the header just below the categories.

View the **'CSF Baseline'** function with all of your **'Maturity Scores'** and each of your **'PRISMA Values'** as well in the next column over.

- **Compliance** – Find all of your data sorted by control level and sifted down to individual Statements.
 - **CSF Baseline** – Search any details on your Statements catered by any baseline filter you like.

[illegible]

CSF Results

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'Assessments'** in the left Nav bar.
4. Click on the **'Compliance'** category at the top of the page.
5. Now choose **'CSF Baseline'** in the header just below the categories.

15.1.3.2.4. CSF Results

View the '**Results**' on each of your '**Control Categories**' down to the '**Unique ID**' of the Assessment at hand.

- **Compliance** – Find all of your data sorted by control level and sifted down to individual Statements.
 - **CSF Results** – Review all of the '**Values**' you have provided and reference any material concerning your Statements **CSF Baseline**.

Control Category	Control Reference	Unique ID	Response Status	Values
CSF Information Security Management Program	ISMS-001/Information Security Management Program	0100-0001/Information Security Management Program	Complete	<p>Level: 2</p> <p>Scope: Yes</p> <p>Requirement Statement: The information protection program is formally documented and actively monitored, reviewed and updated to ensure program objectives continue to be met.</p> <p>Applicability: Yes</p> <p>Maturity Assessment: 100% Policy 100% Process 100% Implemented 1% Measured 1% Managed</p> <p>Maturity Rating (Overall): 0+ (0/175)</p>

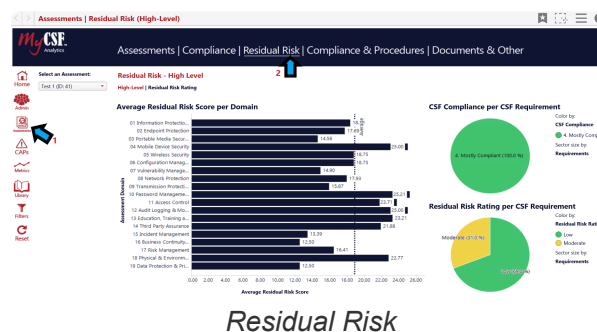
CSF Results

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Assessments**' in the left Nav bar.
4. Click on the '**Compliance**' category at the top of the page.
5. Now choose '**CSF Results**' in the header just below the categories.

15.1.3.3. Residual Risk

The **'Residual Risk'** you carry will be nested here and will carry statistics and charts that mark your vulnerability by **'Residual Risk Score'**, **'CSF Compliance'** and **'Residual Risk Rating'**.

- **'Residual Risk'** – Investigate the areas of your Assessment that may or may not require immediate attention in the **'Scope of your Assessment'** and mark your judgments accordingly.
 - **High Level** – Review all of the Compliance results by domain and your risk scores from any control level.
 - **'Residual Risk Rating'** – Spot each Statement in your Assessment and study the **'Residual Risk Rating'** that join them.

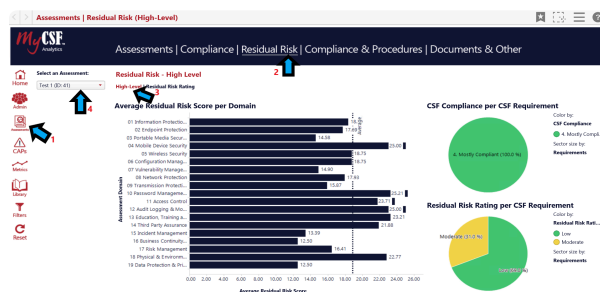


1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'Assessments'** in the left Nav bar.
4. Click on the **'Residual Risk'** category at the top of the page.

15.1.3.3.1. High Level

This option allows us to view the ‘**Table of Domains**’ and the ‘**Residual Risk Ratings**’ that each carries for Statements ‘**Completed in your Assessment**’.

- **Residual Risk** – Investigate the areas of your Assessment that may or may not require immediate attention in the ‘**Scope of your Assessment**’ and mark your judgments accordingly.
 - **High Level** – Review all of the Compliance results by domain and the risk scores for any control level.



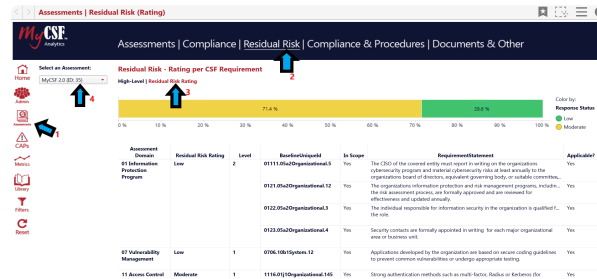
High Level

1. After authenticating through the [MyCSF Portal](#), click on ‘**Analytics**’ in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named ‘**Assessments**’ in the left Nav bar.
4. Click on the ‘**Residual Risk**’ category at the top of the page.
5. Now choose ‘**High Level**’ in the header just below the categories.

15.1.3.3.2. Residual Risk Rating

Study each Statement in/out of your '**Scope**' to find the risk you carry per Statement if it is '**Applicable**'.

- **Residual Risk** – Investigate the areas of your Assessment that may or may not require immediate attention in the '**Scope of your Assessment**' and mark your judgments accordingly.
 - '**Residual Risk Rating**' – Spot each Statement in your Assessment and study the '**Residual Risk Rating**' that join them.



Residual Risk Rating

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Assessments**' in the left Nav bar.
4. Click on the '**Requirements**' category at the top of the page.
5. Now choose '**Residual Risk Rating**' in the header just below the categories.

15.1.3.4. Compliance & Procedures

View all of your **'Policies & Procedures'** for every **'Related HITRUST Control'** in the CSF Library, that is used as a guide for your Assessor.

- **Policies & Procedures** – Glimpse at the relationship between how your Assessor organization establishes criteria for each Statement being assessed.
 - **Illustrative Procedures** – Analyze all of the **'Requirement Statements'** and each **'Value'** that it holds on how your Assessor will set each of your five maturity values.
 - **CSF Implementation** – Review all of the **'Requirement Statements'** and each **'Value'** that corresponds with one another.

Assessments | Compliance & Procedures (Illustrative Procedures)

Select an Assessment:

MyCSF 2.0 Demo (01/2018)

Assessments | Compliance | Residual Risk | Compliance & Procedures | Documents & Other

Compliance & Procedures - Illustrative Procedures

Illustrative Procedures | CSF Representation

Assessment Details	Type	Level	Related HITRUST Control	Image	Requirement Statement	Policy	Values	Procedures
62 Endpoint Protection	Organizational	1	62 Controls Against Malicious Code	Yes	Anti-virus and anti-spyware are installed, operating and updated as of end-user devices to conduct periodic scans of the systems to identify and remove unauthorized software. Remote endpoints for which the server software develops specifically requirements for installing time-based anti-virus and anti-spyware software may achieve the requirement only a network-based network detection (IDS/IPS) solution.	Business policies and/or standards related to the protection against malicious code and detection of harmful policies are required and implemented for the timely installation and upgrade of the protection measures. Including the installation of anti-virus or anti-spyware software also known as end-users and for the regular updating of it, including virus definitions, vulnerability software updates are available. Periodic reviews/updates are required of the installed software and the data content of systems to...	Determine if active procedures exist for the protection against malicious code and spyware or not (the procedural) (substantial). Also, review of the policy and/or requirements (substantial) in the policy level (determine control context) responsible for, key staff involved, levels, and/or other relevant stakeholders (compliance) the policy level requirements to determine if the procedural(s) addresses all the required elements of the organizational requirements whether or not a written policy or procedure exists...	
								Implemented

Illustrative Procedures

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'Assessments'** in the left Nav bar.
4. Click on the **'Policies & Procedures'** category at the top of the page.

15.1.3.4.1. Illustrative Procedures

View how your Assessor grades and establishes protocol when granting compliance levels for each maturity value at your organization by ‘**Requirement Statement**’.

- **Policies & Procedures** – Glimpse at the relationship between how your Assessor organization establishes criteria for each Statement being assessed.
 - **Illustrative Procedures** – Analyze all of the ‘**Requirement Statements**’ and each ‘**Value**’ that it holds on how your Assessor will set each of your five maturity values.

Assessment Details	Type	Level	Related HITRUST Control	Target	Requirement Statement	Policy	Values
IS/Endpoint Protection	Organizational	1	BS1 Controls Against Malicious Code	Yes	Anti-virus and anti-spyware are installed, supported and updated on all end-user devices to protect personally owned or leased systems for which the server software developer specifically recommends not installing host-based anti-virus and anti-spyware software may address the requirement for a network-based malware detector (NWD) solution.	Proactive	Examine policies and/or standards related to the protection against malicious code and determine if the policies are required and implemented. Examine the policies implemented for the timely installation and upgrade of the protective measures, including the installation of anti-virus or anti-spyware software and known in-virus malware, and for the regular updating of it, including virus definitions, automatically software updates are available. Periodic inspections are required of the installed software and the data content of systems to determine if active procedures exist for the protection against malicious code and whether or not the procedures address the maintenance of the protective measures. Examine the policies implemented to verify and/or other relevant subelements required by the policy/standard requirements to determine if the procedures address all the required elements of the policy/standard requirements (whether or not a written policy or procedure exists).
						Implemented	Examine relevant documentation, observe relevant processes, and/or interview the control owners to verify and/or relevant subelements, as needed, for the protection against malicious code and determine if the policy/standard requirements related to the policy have been implemented. For example, verify a sample of endpoint device (laptops, tablets, servers, BYOD, etc.) determine if anti-virus software is installed, operating and up-to-date. Examine the configuration settings for the anti-malware

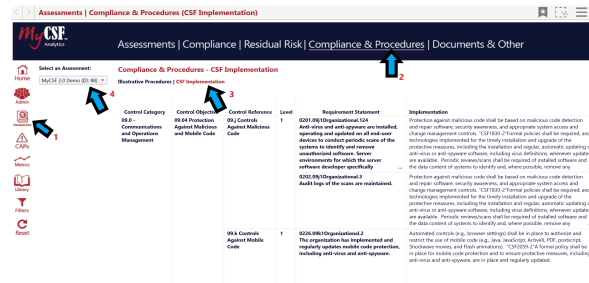
Illustrative Procedures

1. After authenticating through the [MyCSF Portal](#), click on ‘**Analytics**’ in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named ‘**Assessments**’ in the left Nav bar.
4. Click on the ‘**Policies & Procedures**’ category at the top of the page.
5. Now choose ‘**Illustrative Procedures**’ in the header just below the categories.

15.1.3.4.2. CSF Implementation

Here you will find the ‘CSF Implementation’ process for each of your ‘Requirement Statements’.

- **Policies & Procedures** – Glimpse at the relationship between how your Assessor organization establishes criteria for each Statement being assessed.
 - **CSF Implementation** – Review all of the ‘Requirement Statements’ and each ‘Value’ that corresponds with one another.



CSF Implementation

1. After authenticating through the [MyCSF Portal](#), click on ‘**Analytics**’ in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named ‘**Assessments**’ in the left Nav bar.
4. Click on the ‘**Policies & Procedures**’ category at the top of the page.
5. Now choose ‘**CSF Implementation**’ in the header just below the categories.

15.1.3.5. Documents & Other

View all of the **‘Requirements’** that your chosen Assessment is mandated to undergo, including, relevant **‘Controls’** and **‘Authoritative Sources’** for it.

- **Requirements** – Inspect each of the required materials in any assessment ranging from the **‘Controls’** applicable in the **‘Scope of your Assessment’** and the **‘Related Documents’** for each of your Statements.
 - **Potential Requirements** – Find any information coupled with your Assessment in the data provided for **‘Statements’** and **‘Authoritative Sources’**.
 - **Related Documents** – Your Related Documents that have been attached to one of your **‘Statements’** in an Assessment will populate here.

Assessment Details	Requirement Statement	Document Type	Document	Description	Attachment	User Name	Date Updated
E1 Information security objectives, systems, tools, technologies, and programs for the organization security program are formally identified.	Subscriber Documents	ISMS Policy				hituser@hitrust.com	6/12/2018 10:35:14 AM
E2 Endpoint Protection Protection against malware code is based on malware code detection and rapid response, security measures and appropriate system access and change.	Subscriber Documents	ISMS Policy				hituser@hitrust.com	6/12/2018 2:17:34 PM

Documents & Other

1. After authenticating through the [MyCSF Portal](#), click on **‘Analytics’** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **‘Assessments’** in the left Nav bar.
4. Click on the **‘Requirements’** category at the top of the page.

15.1.3.5.1. Related Documents

View any of the **'Related Documents'** under your subscription that has a document attached to any of your **'Statements'** .

- **Requirements** – Inspect each of the required materials in any assessment ranging from the **'Controls'** applicable in the **'Scope of your Assessment'** and the **'Related Documents'** for each of your Statements.
 - **Related Documents** – Your Related Documents that have been attached to one of your **'Statements'** in an Assessment will populate here.



Related Documents

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'Assessments'** in the left Nav bar.
4. Click on the **'Requirements'** category at the top of the page.
5. Now choose **'Related Documents'** in the header just below the categories.

Find your '**Potential Requirements**' to the current state of your Assessment including '**Statements**'; and Authoritative Sources'**.

- **Requirements** – Inspect each of the required materials in any assessment ranging from the ‘**Controls**’ applicable in the ‘**Scope of your Assessment**’ and the ‘**Related Documents**’ for each of your Statements.
 - **Potential Requirements** – Find any information coupled with your Assessment in the data provided for ‘**Statements**’ and Authoritative Sources’**.

Assessments | Documents & Other (Requirements)

Select an Assessment:
None | **ACS**

Documents & Other - All Potential Requirements

Assessment Document ID	Level	Related Internal Security Policy Control	Unique ID	In Scope	Requirement Statement	Applicable
01 Information Protection Program	1	04 Information Security Policy	0113-04a/Operational-123	Yes	Information security objectives, approach, scope, importance, goals and principles for the organization security program are formally identified, contained and approved by senior management or top management and implemented by a controls framework that enables the organization to use it to form the most relevant, accurate and achievable risk assessment to the intended state, and supported by a controls framework that enables the organization.	Yes
00 Wireless Network	1	08 Network Controls	0301-08c/Operational-1	Yes	Wireless devices that contain access points are categorized as vulnerable to the implementation of the assessment.	Yes
			0302-08c/Operational-4	Yes	Wireless access points are configured with strong encryption (AES WPA2 at a minimum).	Yes
			0303-08c/Operational-4	Yes	Wireless access points are placed in secure locations.	Yes
			0304-08c/Operational-5	Yes	Firmware updates are deployed to control any traffic from a wireless network until the current device environment.	Yes
	2	08 Network Controls	0304-08c/Operational-5	Yes	Firmware updates are deployed to control any traffic from a wireless network until the current device environment.	Yes
			0305-08c/Operational-3	Yes	Quarterly scans are performed to identify unpatched wireless access points, and immediate action is taken if any unpatched access points are discovered.	Yes

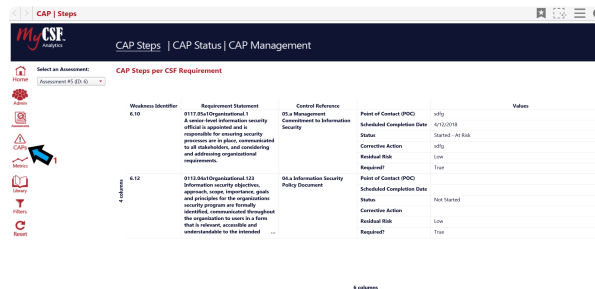
All Potential Requirments

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'Assessments'** in the left Nav bar.
4. Click on the **'Requirements'** category at the top of the page.
5. Now choose **'All Potential Requirements'** in the header just below the categories.

15.1.4. CAPs

The CAPs function is prepared by your Assessor Organization and the Assessor as applicable, and will also serve to describe a ‘**Corrective Action Plan (CAP)**’. These measurements describe the plan to correct deficiencies identified during the Assessment for validation or certification.

- **CAPs** – Find all of the deficiencies you have made in your Assessment and review the CAPs placed by your users within this category and the statuses coupled for each Statement.
 - **CAP Steps** – Find the Information related to your CAP steps entered back under [Adding Corrective Action Plans](#).
 - **CAP Status** – Here you will find the whereabouts on where your CAPs stand as well as insightful charts that label your CAPs and CSF Compliant status.
 - **CAP Management** – This data is pertinent to your Statements that can be salvaged and have missed the CSF compliant status by a narrow margin.



Windows Identifier	Requirement Statement	Control Reference	Point of Contact (POC)	Values
6.10	6.10 (Info/Operational) 1 A senior level information security official is appointed and is responsible for ensuring security processes are in place, communicated to all stakeholders, and consulting and reviewing organizational requirements.	6.10 Management Governance to Information Security	Point of Contact (POC)	Info
			Scheduled Completion Date	6/12/2018
			Status	Not Started
			Corrective Action	Info
			Residual Risk	Low
			Required?	Yes
6.12	6.12 (Info/Operational) 123 Information security objectives, approach, scope, experience, goals and principles for the organization security program are formally identified, communicated throughout the organization to users in a form that is relevant, accessible and understandable to the intended	6.12 Information Security Policy Document	Point of Contact (POC)	Info
			Scheduled Completion Date	Not Started
			Status	Not Started
			Corrective Action	Info
			Residual Risk	Low
			Required?	Yes

CAPs

1. After authenticating through the [MyCSF Portal](#), click on ‘**Analytics**’ in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named ‘**CAPs**’ in the left Nav bar.



If you are completing a Self-Assessment, you will not have the option to review your CAPs in the Dashboards module.

15.1.4.1. CAP Steps

This section allows you to see all of the information placed when entering ‘Adding a Corrective Action Plan’, including ‘Milestones’, ‘Status’, ‘Residual Risk’, and ‘Points of Contact (POC)’.

- **CAPs** – Find all of the deficiencies you have made in your Assessment and review the CAPs placed by your users within this category and the statuses coupled for each Statement.
 - **CAP Steps** – Find the Information related to your CAP steps entered back under [Adding Corrective Action Plans](#).

Weakness Identifier	Requirement Statement	Cost of Reference	Point of Contact (POC)	Values
0101-0101010101010101	The organization has a formal information protection program based on an approved security framework that is understood and applied as needed.	0101-0101010101010101	Scheduled Completion Date	6/16/2018
			Status	Started - On Track
			Corrective Action	This is my corrective action.
			Residual Risk	Medium
			Requestor	True
0101-0101010101010101	The organization has a formal information protection program based on an approved security framework that is understood and applied as needed.	0101-0101010101010101	Scheduled Completion Date	Not Started
			Status	Not Started
			Corrective Action	
			Residual Risk	Medium
			Requestor	True
0101-0101010101010101	The organization has a formal information protection program based on an approved security framework that is understood and applied as needed.	0101-0101010101010101	Scheduled Completion Date	6/16/2018
			Status	Started - At Risk
			Corrective Action	This is my corrective CAP.

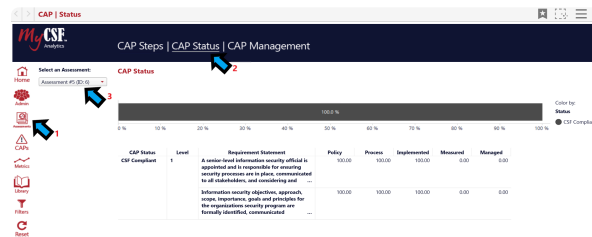
CAP Steps

1. After authenticating through the [MyCSF Portal](#), click on ‘Analytics’ in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **CAPs** in the left Nav bar.
4. Click on the ‘CAP Steps’ category at the top of the page.

15.1.4.2. CAP Status

Here you will find the whereabouts on where your CAPs stand as well as insightful charts that label your **'GAP Identified'** and **'CSF Compliant'** status.

- **CAPs** – Find all of the deficiencies you have made in your Assessment and review the CAPs placed by your users within this category and the statuses coupled for each Statement.
- **CAP Status** – Here you will find the whereabouts on where your CAPs stand as well as insightful charts that label your GAPs and CSF Compliant status.



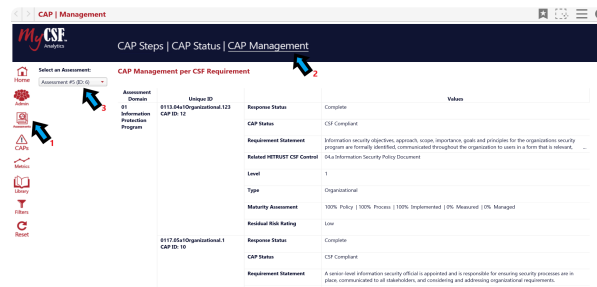
CAP Status

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'CAPs'** in the left Nav bar.
4. Click on the **'CAP Status'** category at the top of the page.

15.1.4.3. CAP Management

View all of the statuses of each Statement that have been issued a '**CAP Management**' and the maturity scoring from these Statements.

- **CAPs** – Find all of the deficiencies you have made in your Assessment and review the CAPs placed by your users within this category and the statuses coupled for each Statement.
 - **CAP Management** – This data is pertinent to your Statements that can be salvaged and have missed the CSF compliant status by a narrow margin.



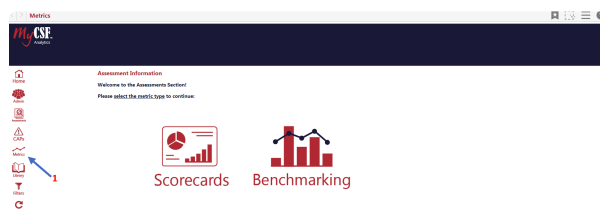
CAP Management

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **CAPs** in the left Nav bar.
4. Click on the '**CAP Management**' category at the top of the page.

15.1.5. Metrics

The 'Metrics' section compiles industry data that is associated to your organization and reflects averages, standards, and patterns, to their security testing. Users can make quick comparisons on where their organization stands along with any discernment made on behalf of your organization from your '**Benchmarking**' and '**Scorecard**' evidence.

- **Metrics** – The '**Metrics**' section compiles industry data that is associated to your organization and reflects averages, standards, and patterns, to their security testing.
 - **Scorecards** – Our Scorecards section contains valuable information comparing your average maturity scores to an Authoritative body.
 - **Benchmarking** – This option enables a user to search through data that has been collected for relevant Validated Assessments to allow our users to do a quick comparison against their industry standards.
 - **Benchmarking** – This option enables a user to search through data that has been collected for relevant Validated Assessments to allow our users to do a quick comparison against their industry standards
 - **Statistics** – Compare the top 10th or bottom 90th percentile of any one of your Assessments as well as the Avg Maturity Averages for each of your domains.



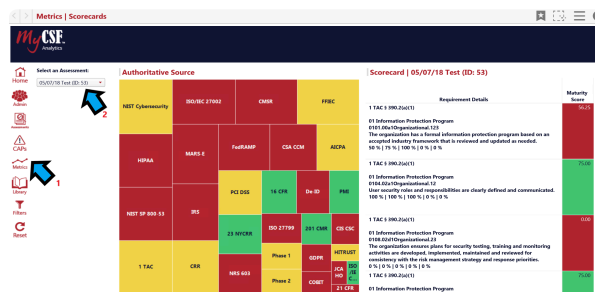
Metrics

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Metrics**' in the left Nav bar.

15.1.5.1. Scorecards

Determine how your Statement results comply with your average maturity scores to any of the sections of our more popular standardizing bodies. Review your outcomes and compare it to one of the **‘Authoritative Source Sections’** given to discover how secure the environment is.

- **Metrics** – The **‘Metrics’** section compiles industry data that is associated to your organization and reflects averages, standards, and patterns, to their security testing.
 - **Scorecards** – Our Scorecards section contains valuable information comparing your average maturity scores to an Authoritative body.



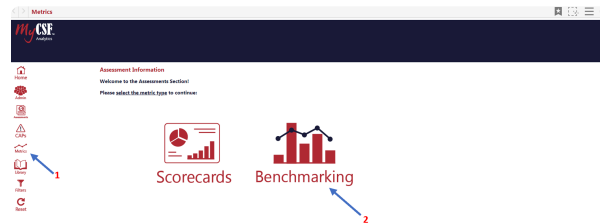
Scorecards

1. After authenticating through the [MyCSF Portal](#), click on **‘Analytics’** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **‘Metrics’** in the left Nav bar.
4. Click on the **‘Scorecards’** option on the left side of the page.

15.1.5.2. Benchmarking

This option enables a user to search through data that has been collected for relevant Validated Assessments to allow our users to do a quick comparison check against their industry standards.

- **Metrics** – The '**Metrics**' section compiles industry data that is associated to your organization and reflects averages, standards, and patterns, to their security testing.
 - **Benchmarking** – This option enables a user to search through data that has been collected for relevant Validated Assessments to allow our users to do a quick comparison against their industry standards.
 - **Benchmarking** – Review each domains Avg Maturity Scores and find the averages between two or more Assessments and the industry Benchmark.
 - **Statistics** – Compare the top 10th or bottom 90th percentile of any one of your Assessments as well as the Avg Maturity Averages for each of your domains.



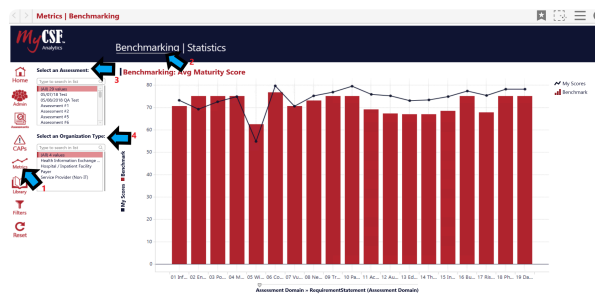
Benchmarking

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Metrics**' in the left Nav bar.
4. Click on the '**Benchmarking**' option on the rights side of the page.

15.1.5.2.1. Benchmarking

Review each domains Avg Maturity Scores and find the averages between two or more Assessments and the industry Benchmark.

- **Benchmarking** – This option enables a user to search through data that has been collected for relevant Validated Assessments to allow our users to do a quick comparison against their industry standards.
 - **Benchmarking** – Review each domains Avg Maturity Scores and find the averages between two or more Assessments and the industry Benchmark.



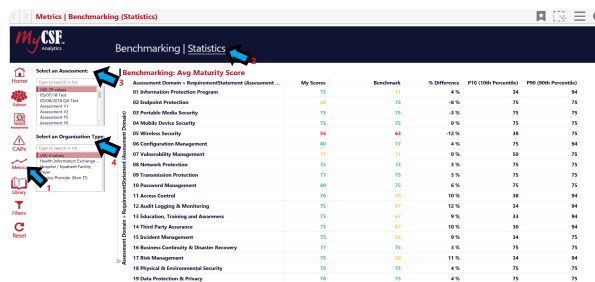
Benchmarking

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Benchmarking' in the left Nav bar.
4. Click on the 'Benchmarking' option on the left side of the page.

15.1.5.2.2. Statistics

Compare the top 10th or bottom 90th percentile of any one of your Assessments as well as the Avg Maturity Averages for each of your domains.

- **Benchmarking** – This option enables a user to search through data that has been collected for relevant Validated Assessments to allow our users to do a quick comparison against their industry standards.
 - **Statistics** – Compare the top 10th or bottom 90th percentile of any one of your Assessments as well as the Avg Maturity Averages for each of your domains.



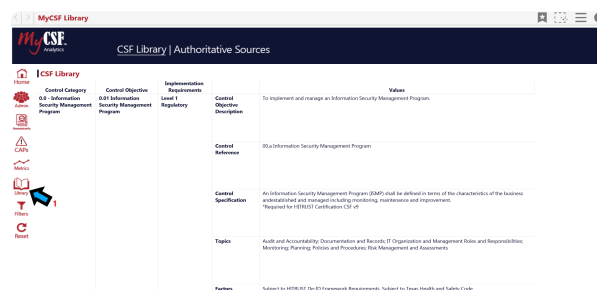
Statistics

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Benchmarking' in the left Nav bar.
4. Click on the 'Statistics' option on the left side of the page.

15.1.6. Library

Use the **'Library'** to find all information associated with it, including a complete overview of the **'Authoritative Sources'**, **'Control Categories'**, and **'Assessment Domains'**.

- **Library** – The Library module is the gateway to entering the **'MyCSF'** Library to review the most current up to date version of MyCSF.
 - **CSF Library** – The Library module is the gateway to entering the MyCSF Library and all of the CSF **'Control Categories'** down to its **'Values'**.
 - **Authoritative Sources** – This section of the Library gives you the opportunity to read all of the **'Authoritative Sources'** in the MyCSF Library down to **'Authoritative Source Sections'**.



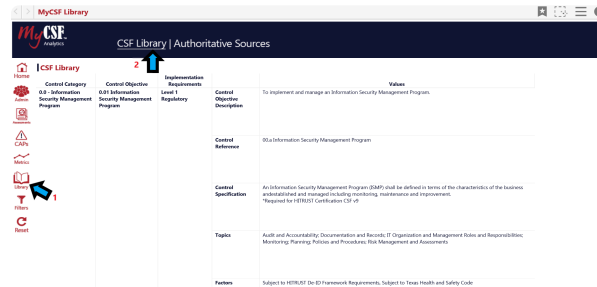
Library

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'Library'** in the left Nav bar.

15.1.6.1. CSF Library

The '**CSF Library**' function will have facts related to the Control Categories and its respective subsections.

- **Library** – The Library module is the gateway to entering the '**MyCSF Library**' to review the most current up to date version of MyCSF.
 - **CSF Library** – The Library module is the gateway to entering the MyCSF Library and all of the CSF '**Control Categories**' down to its '**Values**'.



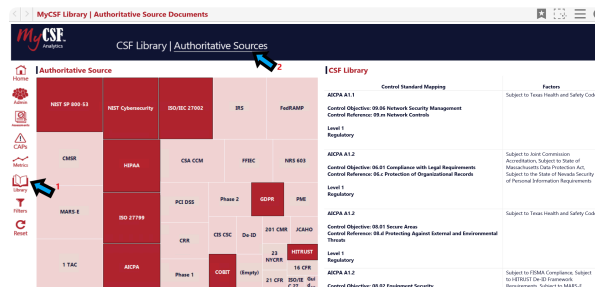
CSF Library

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named '**Library**' in the left Nav bar.
4. Click on the '**CSF Library**' category at the top of the page.

15.1.6.2. Authoritative Sources

Here in **'Authoritative Sources'**, find the entire listing of any governance and regulatory bodies that could be included in your Assessment and each of the sections per Source.

- **Library** – The Library module is the gateway to entering the **'MyCSF'** Library to review the most current up to date version of MyCSF.
 - **Authoritative Sources** – This section of the Library gives you the opportunity to read all of the **'Authoritative Sources'** in the MyCSF Library down to **'Authoritative Source Sections'**.



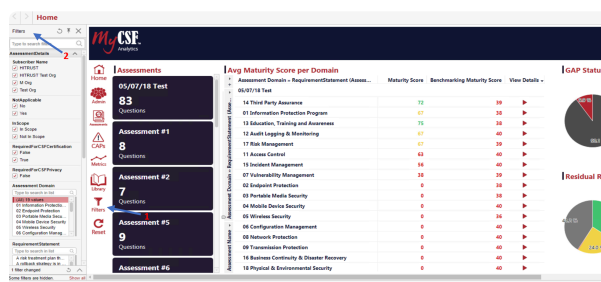
Authoritative Sources

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named **'Library'** in the left Nav bar.
4. Click on the **'Authoritative Sources'** category at the top of the page.

15.1.7. Filters

Use the Filters module to narrow down a search on specific Statements you may be looking for and the Assessments they may lie in. This includes filters such as **Not Applicable**, **In Scope**, **Required for CSF Certification**, **Maturity Rating**, and **Gap Rating**.

- **Filters** – Filter through your assessment by Subscriber Name, Not Applicable, In Scope, Assessment Domain to narrow down a specific answer you are looking for.
 - **Subscriber Name** – Click on a checkbox to narrow down your search for one of your subscribers.
 - **Not Applicable** – Click on either No, Yes, or both to find the Domains that were mentioned as Not Applicable.
 - **In Scope** – Click on either In Scope, Not In Scope, or both check boxes if you want to only view the controls that were applicable in your Assessment.
 - **Required for CSF Certification** – Click on either False, True, or both to find the Domains that are Required for CSF Certification.
 - **Required for CSF Privacy** – Click on the False checkbox if you do not want to include the CSF Privacy Domain in your search.
 - **Assessment Domain** – Click on one of your Domains to view only the Statements from those Assessments pertaining to the Domains Selected.
 - **Requirement Statement** – Search for any individual Requirement Statements in your Assessments by typing in the Description of the Statement in the search field.
 - **Maturity Rating** – Search and find Statements for any Maturity Rating values ranging from 1- to 5+ in any of your Assessments.
 - **GAP Rating** – Click both CSF Compliant or GAP Identified to produce Domains that contain these options in your search.
 - **Residual Risk Rating** – Find the risk rating each Assessment carries corresponding to the results from their Assessments.
 - **User Name** – Find Statements that any one of your users under this subscription have answered including those users assigned to Statements



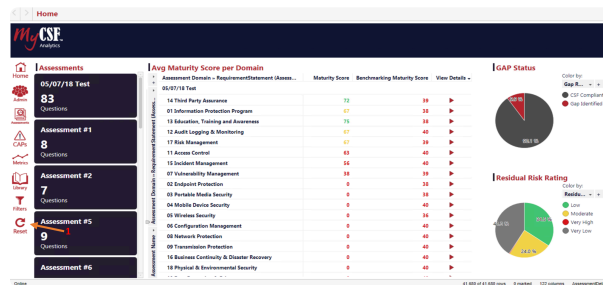
Filters

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Filters' in the left Nav bar.

15.1.8. Reset

Click on this button to refresh the page and restore any settings you have made in the filters and any modifications you have made in the Dashboards feature.

- **Reset** – This function allows you to reset all of the filters you have applied and any changes you have made while maneuvering through your charts.

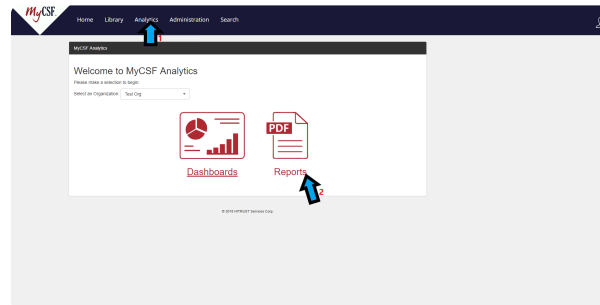


Reset

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the module named 'Reset' in the left Nav bar.

15.2. Reports

Find your Internal and External Reports housed under the **'Reports'** section of the **'Analytics'** portion of **'MyCSF'**.

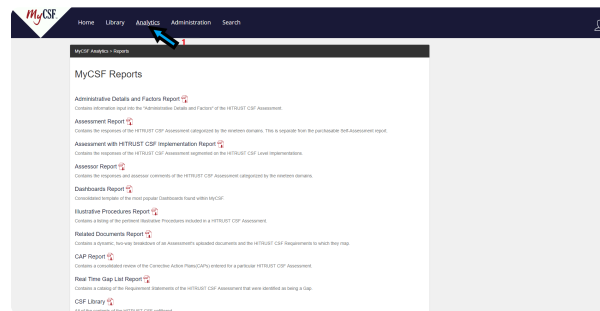


Reports

1. After authenticating through the [MyCSF Portal](#), click on **'Analytics'** in the top Menu bar.
2. Once pressed, choose the option of ['Reports'](#)

15.2.1. External Reports

These reports are available for subscribers to view their MyCSF Scoping Information as well as Documents, CAPs entered, Maturity Scores, and the state of your Assessment in the **‘QA Progress Report’**.



Internal Reports

1. After authenticating through the [MyCSF Portal](#), click on **‘Analytics’** in the top Menu bar.
2. Once pressed, choose the option of **‘Reports’**

15.2.1.1. Administrative Details and Factors Report

Contains information input into the “Administrative Details and Factors” of the HITRUST CSF Assessment.

The screenshot shows the HITRUST Administrative Details and Factors Report form. The form is titled 'Form 1 Administrative Details and Factors' and contains several sections: 'Organization Information', 'Operational Profile', 'Environment', 'Assessment System', and 'Operational Factors'. Each section has a table with fields for data entry. Arrows 1 and 2 point to the top navigation bar and the 'Reports' button respectively.

Organization Information	
Contact Name	Contact Name
Contact Title	Contact Title
Contact Email	Contact Email
Contact Phone (V)	Contact Phone (V)
Contact Phone (O)	Contact Phone (O)

Operational Profile	
Name of the Organization	Operational System
Location of the Organization	Location
Primary mailing address	Mailing Address
Organization Size (FTE)	Industry
Number of Employees	IS

Environment	
Provide a description of the environment in which the system is operating. (e.g., cloud, on-premise, hybrid, etc.)	
The system and related hardware - (e.g., server, storage, network, etc.)	
Software - (e.g., operating system, database, etc.)	
Data - (e.g., data source, data type, etc.)	

Assessment System	
Assessment Type	Assessment System
Assessment Scope	Assessment Scope

Factors	
Organization Type	Factor
Entity Type	Control Entity

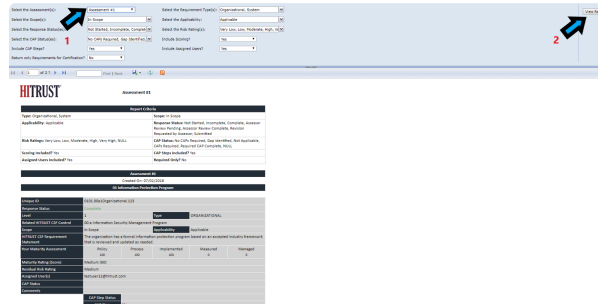
Operational Factors	
Number of Records that are currently held	

Administrative Details and Factors Report

1. After authenticating through the [‘MyCSF Portal’](#), click on **‘Analytics’** in the top Menu bar.
2. Once pressed, choose the option of [‘Reports’](#)
3. Select **‘Administrative Details and Factors Report’** from the list of **MyCSF Reports’**

15.2.1.2. Assessment Report

Contains the responses of the HITRUST CSF Assessment categorizes by the nineteen domains. This is separate from the purchasable Self-Assessment report.

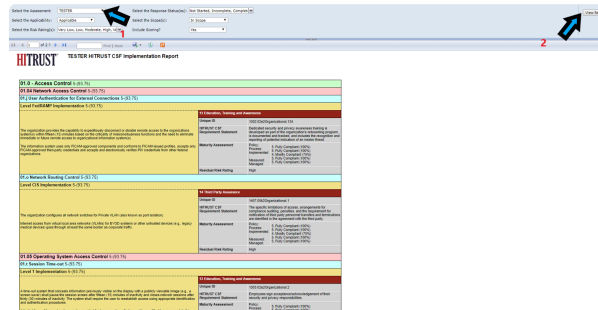


Assessment Report

1. After authenticating through the '[MyCSF Portal](#)', click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of '[Reports](#)'
3. Select '**Assessment Report**' from the list of **MyCSF Reports**'

15.2.1.3. Assessment with HITRUST CSF Implementation Report

Contains the responses of the HITRUST CSF Assessment categorized by the nineteen domains. This is separate from the purchasable Self-Assessment report.

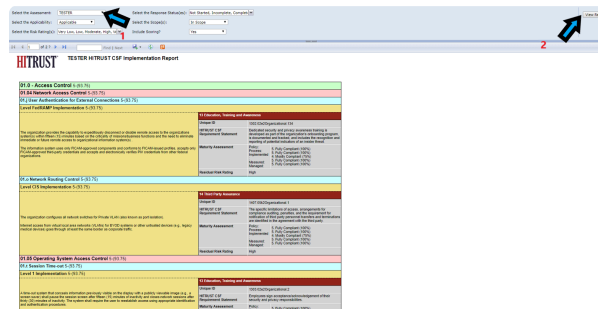


Assessment with HITRUST CSF Implementation Report

1. After authenticating through the [‘MyCSF Portal’](#), click on **‘Analytics’** in the top Menu bar.
2. Once pressed, choose the option of [‘Reports’](#)
3. Select **‘Assessment with HITRUST CSF Implementation Report’** from the list of **MyCSF Reports’**.

15.2.1.4. Assessor Report

Contains the responses and assessor comments of the HITRUST CSF Assessment categorized by the nineteen domains.



Assessment with HITRUST CSF Implementation Report

1. After authenticating through the '[MyCSF Portal](#)', click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of '[Reports](#)'
3. Select '**Assessor Report**' from the list of **MyCSF Reports**'.

15.2.1.5. Dashboards Report

Consolidated template of the most popular Dashboards found within the MyCSF.

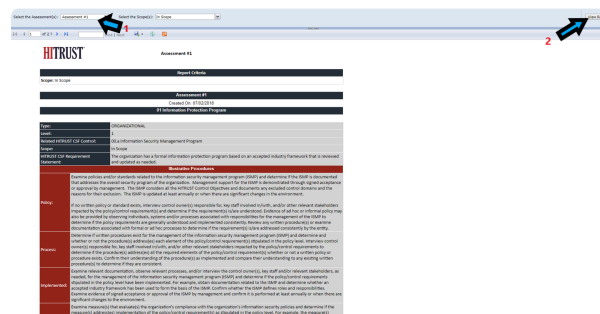


Dashboard Report

1. After authenticating through the '[MyCSF Portal](#)', click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of '[Reports](#)'
3. Select '**Dashboards Report**' from the list of **MyCSF Reports**'.

15.2.1.6. Illustrative Procedures Report

Contains a listing of the pertinent Illustrative Procedures included in a HITRUST CSF Assessment.



Illustrative Procedures Report

1. After authenticating through the '[MyCSF Portal](#)', click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of '[Reports](#)'
3. Select '**Illustrative Procedures Report**' from the list of **MyCSF Reports**'.

15.2.1.7. Related Documents Report

Contains a dynamic, two-way breakdown of an Assessment's uploaded documents and the HITRUST CSF Requirements to which they map.



Related Documents Report

1. After authenticating through the '[MyCSF Portal](#)', click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of '[Reports](#)'
3. Select '**Related Documents Report**' from the list of **MyCSF Reports**'.

Contains a consolidated review of the Corrective Action Plans (CAPs) entered for a particular HITRUST CSF Assessment.

CAP Report

1. After authenticating through the '[MyCSF Portal](#)', click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of '[Reports](#)'
3. Select '**CAP Report**' from the list of **MyCSF Reports**'.

Contains a catalog of the Requirement Statements of the HITRUST CSF Assessment that were identified as being a GAP.

Real Time Gap List Report

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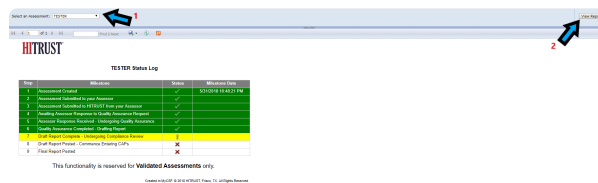
All of the contents of the HITRUST CSF unfiltered.

CSF Library

1. After authenticating through the '[MyCSF Portal](#)', click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of '[Reports](#)'
3. Select '**CSF Library**' from the list of **MyCSF Reports**'.

15.2.1.11. QA Progress Report

Summarizes the status of a validated assessment only.

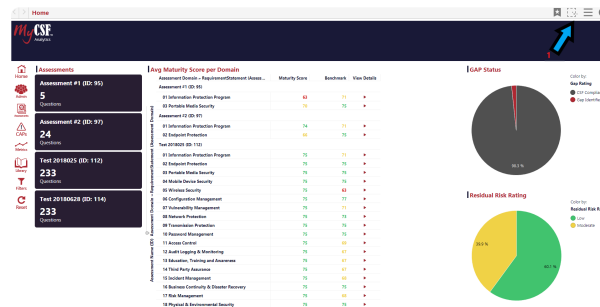


QA Progress Report

1. After authenticating through the '[MyCSF Portal](#)', click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of '[Reports](#)'
3. Select '**QA Progress Report**' from the list of **MyCSF Reports**'.

15.3. Application Bar

This tool will be a useful asset in retaining information while navigating the Dashboards section of MyCSF including Bookmarking,

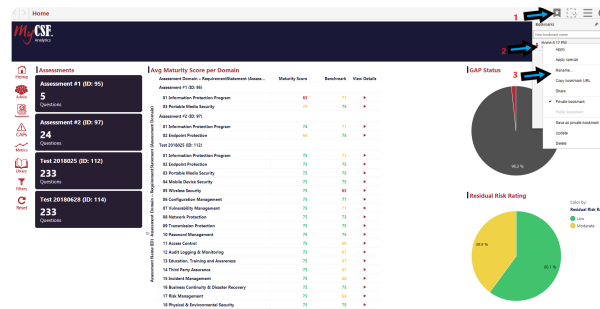


Application Bar

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Find the 'Four Option Icons' at the top-right of the page.

15.3.1. Bookmarks

Stop at any area of the dashboards by bookmarking your spot to start back at the exact URL including any modifications you have been making while examining your data on the Dashboards whenever you sign in.

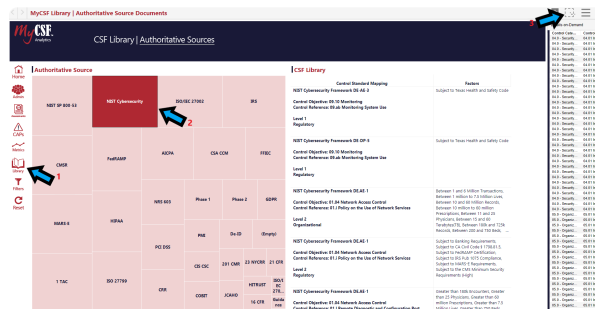


Bookmark

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press the '**Banner**' in the top right corner of the screen with the '**Star**' in the center of it.

15.3.2. Details-on-Demand

Find extended information about any action in the Dashboards to quick information about that particular option you have pressed on any Dashboards section such as, '**Home**', '**Assessments**', '**Library**' etc.

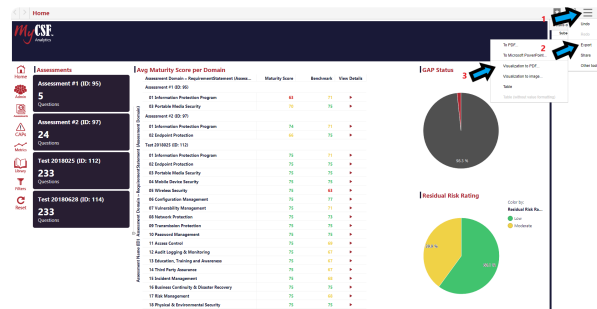


Details on Demand

1. After authenticating through the [MyCSF Portal](#), click on '**Analytics**' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Press anything to modify in the [Dashboards](#).
4. Look to the top-right of the screen and press the '**Dashed Square**' of the '**Application Bar**'.

15.3.3. Menu

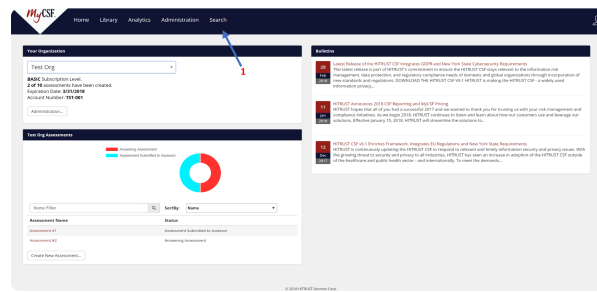
Export tables in the form of PDF or Excel spreadsheets to transmit any data from your Dashboards for presentation or emailing your colleagues for Powerpoint or other presentations.



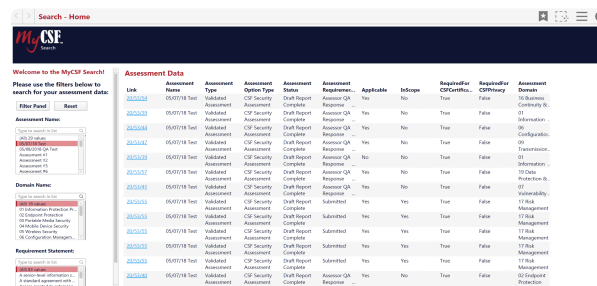
Menu

1. After authenticating through the [MyCSF Portal](#), click on 'Analytics' in the top Menu bar.
2. Once pressed, choose the option of [Dashboards](#).
3. Look to the top-right of the screen and press the 'Three Horizontal Lines' icon of the 'Application Bar' to export your data.

16. Search



Search



Search Analytics