

# Qualified Service Organization (QSO) Worksheet

Part 2 restrictions on disclosure do not apply to communication between the Part 2 provider and the information needed by the QSO to provide services under the QSOA. If you are a QSO you must have a written QSOA (please see QSO guide)

1. Organization Name:  
\_\_\_\_\_

2. Key Function (see bottom right):  
**Part 2 Provider**

7. What data is being shared?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Organization Name:  
\_\_\_\_\_

4. Key Function:  
\_\_\_\_\_  
\_\_\_\_\_

12. What data is being shared?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. Organization Name:  
\_\_\_\_\_

9. Key Function:  
\_\_\_\_\_

5. Purpose for sharing information:  
\_\_\_\_\_

*Examples of QSO services include: Data processing, bill collecting, dosage preparation, laboratory analysis, legal, accounting, population health management, medical staffing, other professional services, and services to prevent or treat child abuse or neglect (including training on nutrition, child care, and group therapy)*

6. Part 2 pathway allowing for information share:  
**QSO Exception to Part 2**

10. Purpose for sharing information:  
\_\_\_\_\_

*The QSO Agent must be contracted to help the QSO provide services to the Part 2 provider (see left for list of QSO services)*

11. Part 2 pathway allowing for information share:  
**QSO Exception to Part 2**

**Key Function (key role in this disclosure):** Part 2 Provider, Third-Party Payer, Medicaid, MCO, IDN Partner/Provider, IDN Administrative Lead, Data Aggregator, CMS

