



# iQIES Survey & Certification Job Aid

## CLIA Data Exchange

### Overview

CLIA Data Exchange consolidates CLIA-related working files in iQIES that are used for both internal and public consumption.

### User Role Access

**Note:** Review [iQIES Onboarding Process: CLIA User Roles](#) for details on how to request a specific user role. Information below shows the role to request for each step in iQIES.

- **PECOS**

**Request User Role:**

CMS -> CLIA Data Exchange User -> CLIA Data Exchange User - PECOS

**Access to:** PECOS folder in Data Exchange

- **State Agency**

**Request User Role:**

State Agency -> State Agency - *CLIA Billing User*

**Access to:** All files in Data Exchange

- **Contractor**

**Request User Role:**

Contractor -> CLIA Billing Contractor -> VersaTech

**Access to:**

- Demographic Data folder
- Certificate Mailing folder
- Letter of Accreditation mailing folder
- Fee Coupon Mailing folder

- **CMS**

**Request User Role:**

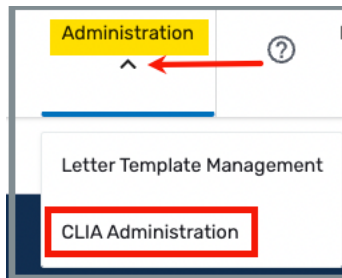
CMSGU and CLIA Billing Admin

CMSGU and CLIA Billing User

**Access to:** All files in Data Exchange

## CLIA Dashboard/Landing Page

1. Log in to iQIES.
2. Click **CLIA Administration** from the top menu **Administration** tab. See *Figure 1, CLIA Administration*. The **CLIA Administration Dashboard** opens. See *Figure 2, Dashboard/Landing Page*.



*Figure 1: CLIA Administration*



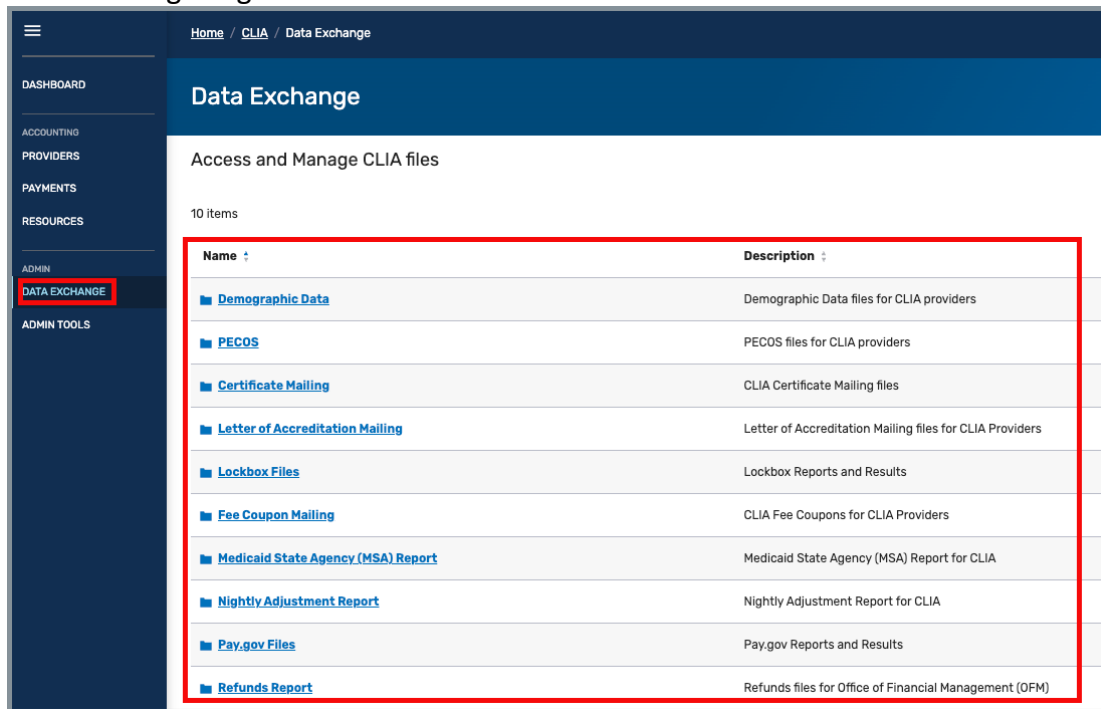
*Figure 2: Dashboard/Landing Page*

## CLIA Data Exchange

### Notes:

- Files in the CLIA Data Exchange are retained in:
    - Data Exchange for 60 days
    - AWS storage for 10 years before being permanently removed
  - Only authorized personnel can access the cloud-based folders after files have been removed
  - The file is downloaded on a weekly basis by authorized personnel
- Click **Data Exchange** on the left menu. See *Figure 3, Data Exchange Page*. The **Data Exchange** page opens.

### Data Exchange Page



Name	Description
<a href="#">Demographic Data</a>	Demographic Data files for CLIA providers
<a href="#">PECOS</a>	PECOS files for CLIA providers
<a href="#">Certificate Mailing</a>	CLIA Certificate Mailing files
<a href="#">Letter of Accreditation Mailing</a>	Letter of Accreditation Mailing files for CLIA Providers
<a href="#">Lockbox Files</a>	Lockbox Reports and Results
<a href="#">Fee Coupon Mailing</a>	CLIA Fee Coupons for CLIA Providers
<a href="#">Medicaid State Agency (MSA) Report</a>	Medicaid State Agency (MSA) Report for CLIA
<a href="#">Nightly Adjustment Report</a>	Nightly Adjustment Report for CLIA
<a href="#">Pay.gov Files</a>	Pay.gov Reports and Results
<a href="#">Refunds Report</a>	Refunds files for Office of Financial Management (OFM)

*Figure 3: Data Exchange Page*

### Notes:

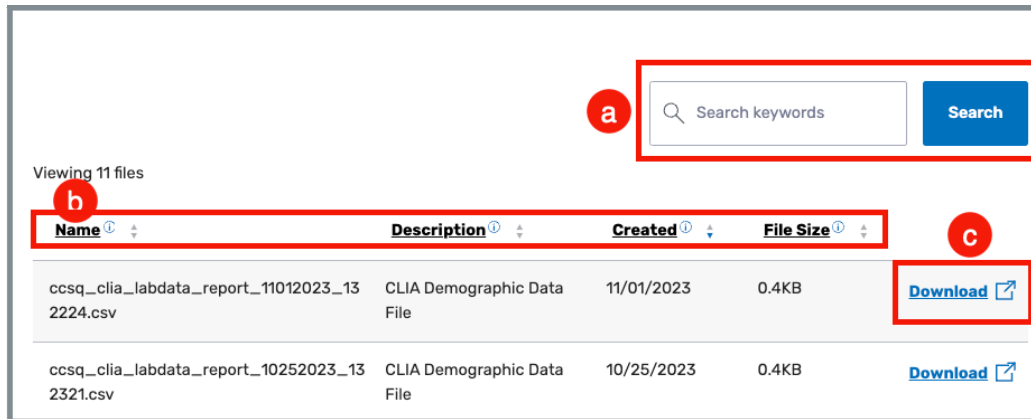
- There are ten folders in the **Data Exchange** folder. Each folder has numerous files. See *Table 1, Data Exchange Folders Detail*.
- Starting in April 2024, only labs that need paper records for the following will be stored in the Data Exchange:
  - Certificate Mailing
  - Letter of Accreditation Mailing
  - Fee Coupon Mailing

- Labs that have opted for electronic communication will be stored in the iQIES S3 archive.

**Table 1: Data Exchange Folders Detail**

Folder Name	Explanation
<b>Demographic Data</b>	Demographic files are used to provide the backend data to the public facing QCOR lab lookup: <a href="https://qcor.cms.gov/main.jsp">https://qcor.cms.gov/main.jsp</a> CLIA demographic files are run weekly.
<b>PECOS</b>	PECOS files are run weekly.
<b>Certificate Mailing</b>	Available PDF certificates. CLIA certificates are run weekly.
<b>Letter of Accreditation Mailing</b>	Available PDF letters for labs that need to update their Letter of Accreditation status.
<b>Lockbox Files</b>	Daily report shows checks that processed for the previous day. File is updated M-F (excluding federal holidays).
<b>Fee Coupon Mailing</b>	PDF fee coupons for bank processing for CLIA-related fees. Folder is updated weekly. There is a manifest text file that shows how many zip files were generated for that week's coupon files. There can be multiple zip files for that week.
<b>Medicaid State Agency (MSA) Report</b>	Used for reimbursement eligibility. Folder is updated weekly.
<b>Nightly Adjustment Report</b>	Used for financial auditing for incoming and outgoing CLIA monies. Folder is updated M-F.
<b>Pay.gov Files</b>	Used to track online payments. File is updated 7 days a week.
<b>Refunds Report</b>	Used to track labs that have received CLIA refunds. Updated weekly.

2. Click any folder to review the contents. The folder opens with a list of included files. See *Figure 4, Detailed File Information* and *Table 2, Detailed File Information Callout*.



**Figure 4: Detailed File Information**

**Table 2: Detailed File Information Callout**

Callout	Detailed Explanation
<b>a</b>	Type a keyword or date to search for a specific file. Click <b>Search</b> .
<b>b</b>	Each heading shows detailed information about the recipient list. The headings can be sorted by clicking the arrows to the right of each heading.
<b>c</b>	Click <b>Download</b> to download the specific file.