



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

Notes:

- 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.
- Users may see CLIA roles other than the ones noted below. Those roles are restricted and cannot be requested. They are: **CLIA Billing Admin** and **CLIA Billing Super User (Restricted)**.

- **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 Lead 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*.

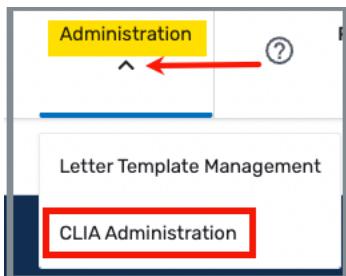


Figure 1: CLIA Administration



Figure 2: Dashboard/Landing Page

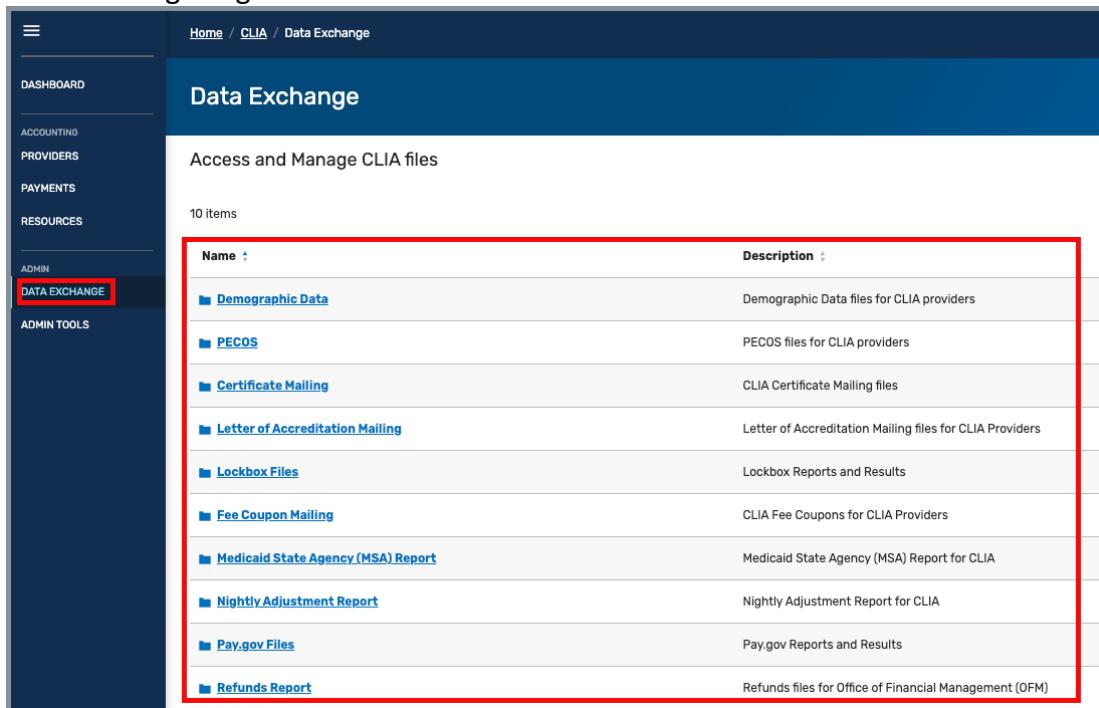
CLIA Data Exchange

Notes:

- Files in the CLIA Date 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

1. Click **Data Exchange** on the left menu. See *Figure 3, Data Exchange Page*. The **Data Exchange** page opens.

Data Exchange Page



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

Figure 3: Data Exchange Page

Notes:

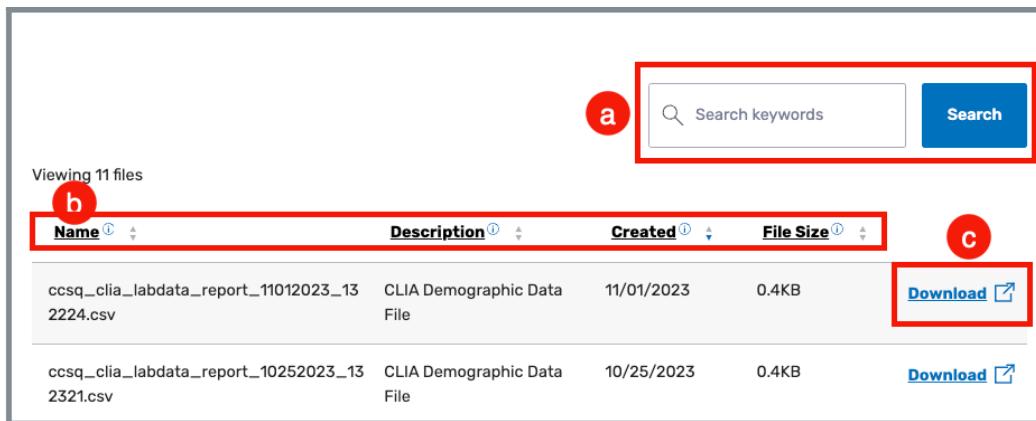
- There are ten folders in the **Data Exchange** folder. Each folder has numerous files. See *Table 1, Data Exchange Folders Detail*.
- Starting in April 2024, only labs that need paper records for the following will be stored in the Data Exchange:
 - Certificate Mailing
 - Letter of Accreditation Mailing
 - 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
Demographic Data	Demographic files are used to provide the backend data to the public facing QCOR lab lookup: https://qcor.cms.gov/main.jsp CLIA demographic files are run weekly.
PECOS	PECOS files are run weekly.
Certificate Mailing	Available PDF certificates. CLIA certificates are run weekly.
Letter of Accreditation Mailing	Available PDF letters for labs that need to update their Letter of Accreditation status.
Lockbox Files	Daily report shows checks that processed for the previous day. File is updated M-F (excluding federal holidays).
Fee Coupon Mailing	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.
Medicaid State Agency (MSA) Report	Used for reimbursement eligibility. Folder is updated weekly.
Nightly Adjustment Report	Used for financial auditing for incoming and outgoing CLIA monies. Folder is updated M-F.
Pay.gov Files	Used to track online payments. File is updated 7 days a week.
Refunds Report	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*.



Viewing 11 files				
Name	Description	Created	File Size	
ccsq_clia_labdata_report_11012023_13 2224.csv	CLIA Demographic Data File	11/01/2023	0.4KB	Download
ccsq_clia_labdata_report_10252023_13 2321.csv	CLIA Demographic Data File	10/25/2023	0.4KB	Download

Figure 4: Detailed File Information

Table 2: Detailed File Information Callout

Callout	Detailed Explanation
a	Type a keyword or date to search for a specific file. Click Search .
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.
c	Click Download to download the specific file.