



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Idea Portal User Manual and Frequently Asked Questions (FAQ)

**Version 2.0
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1. Introduction

This manual outlines the steps needed to submit, comment, vote, and follow ideas on how to improve or enhance iQIES.

See [Appendix A](#) for FAQs on the Idea Portal.

Below is important general information about iQIES.

- Refer to the [iQIES Onboarding Guide](#) for further information on access to [HARP](#) (Health Care Quality Information Systems (HCQIS) Access Roles and Profile), if necessary.
- All screenshots included in this manual contain only test data. Current screens in the Idea Portal may differ from what is shown in screenshots below.
- Words highlighted in blue are clickable links.
- Contact the iQIES Service Center at 888-477-7876 or iQIES@cms.hhs.gov for technical support.

2. Access the Idea Portal

- 2.1 Go to [CCSQ Support Central](#). A HARP User ID is required to log into CCSQ Support Central.

Note: CCSQ Support Central can also be accessed from the bottom of any [iQIES Help page](#).

- 2.2 Click **Idea Portals** on the top menu. See *Figure 1, CCSQ SupportCentral Top Menu*. The **Idea Portals** page opens.

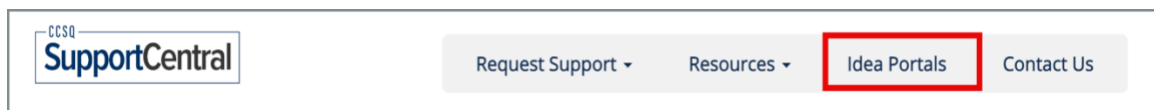
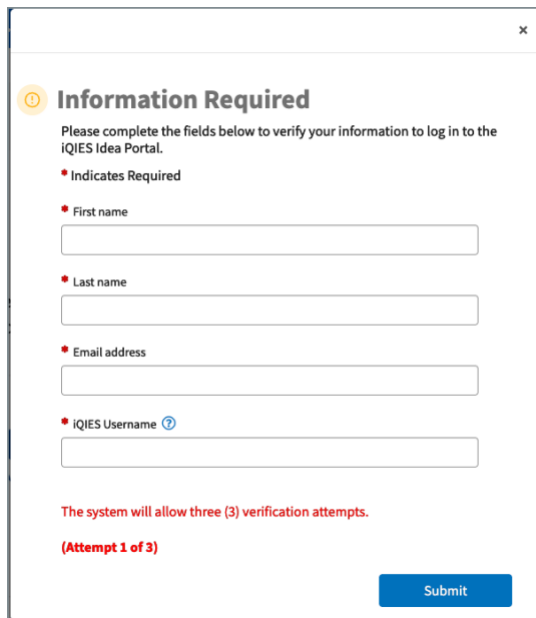


Figure 1: CCSQ SupportCentral Top Menu

- 2.3 Select **iQIES** from the available options.
- 2.4 The **Information Required** pop-up window appears. Fill in the fields with your information and click **Submit**. See *Figure 2, Information Required Window*.

Note: An iQIES user name and HARP ID are the same.

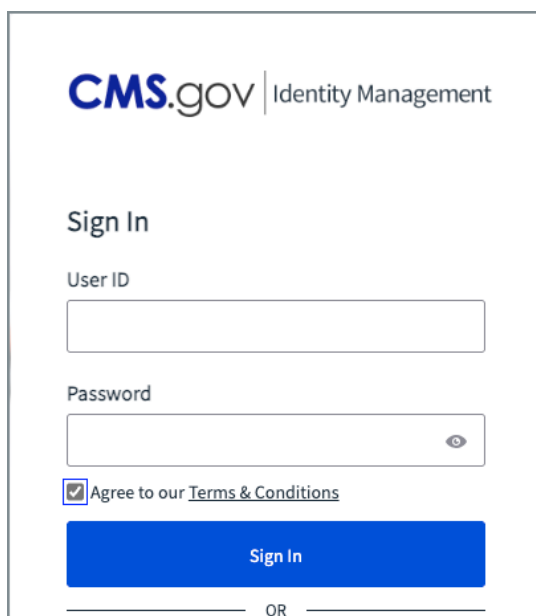


The screenshot shows a modal window titled "Information Required" with a yellow information icon. The text inside says: "Please complete the fields below to verify your information to log in to the iQIES Idea Portal." Below this is a red asterisk and the text "Indicates Required". There are four input fields, each preceded by a red asterisk: "First name", "Last name", "Email address", and "iQIES Username" (which has a help icon). At the bottom left, it says "The system will allow three (3) verification attempts." and "(Attempt 1 of 3)". A blue "Submit" button is at the bottom right.

Figure 2: Information Required Window

Note:

If the user is not logged in to CMS.gov, then the CMS.gov Identity Management page opens, and the user must enter in their information to proceed. See *Figure 3, Information Required Window*.



The screenshot shows the CMS.gov Identity Management Sign In page. At the top is the CMS.gov logo and "Identity Management". Below is the "Sign In" heading. There are two input fields: "User ID" and "Password" (with an eye icon for toggling visibility). Below the password field is a checkbox labeled "Agree to our Terms & Conditions". A large blue "Sign In" button is at the bottom. Below the button is a horizontal line with "OR" in the center.

Figure 3: CMS Identity Management Sign In Page

2.5 The iQIES Idea Portal landing page opens.

3. Idea Portal Landing Page Details

The **Idea Portal** landing page shows submitted ideas. See *Figure 4, Idea Portal Landing Page* and *Table 1, Idea Portal Landing Page Callout Details* for detailed information on the landing page.

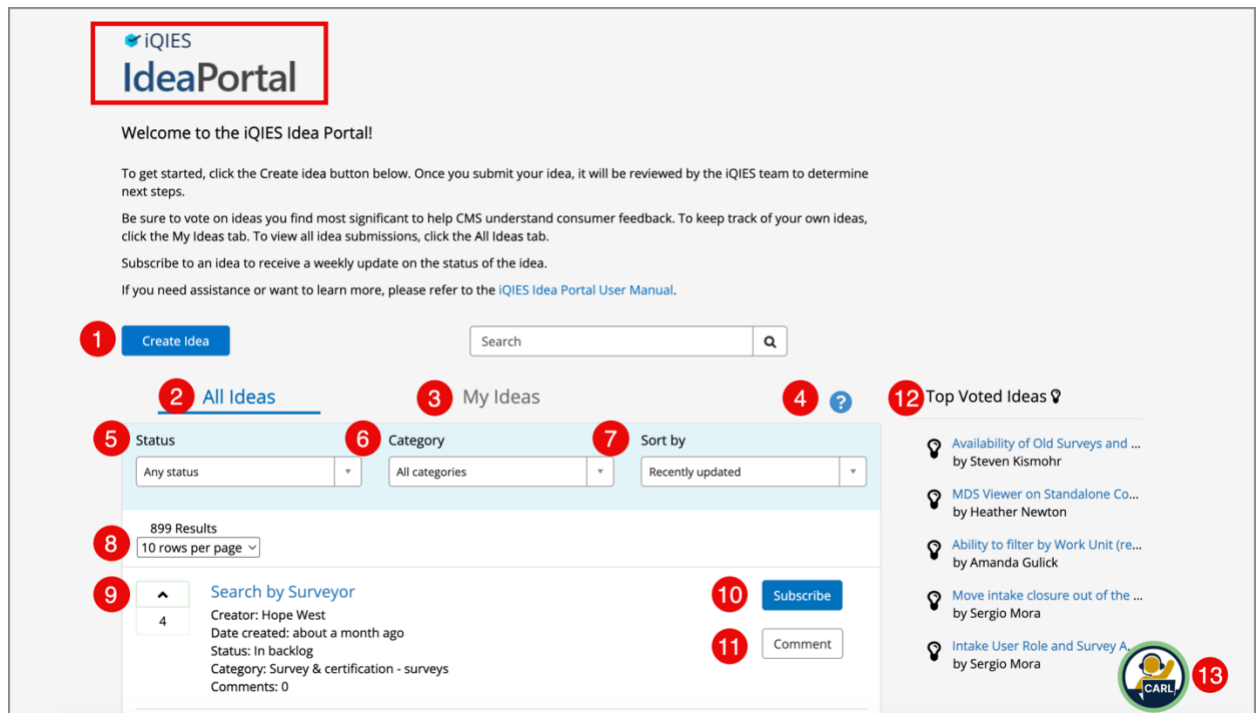


Figure 4: Idea Portal Landing Page

Table 1: Idea Portal Callout Details

Callout	Name	Detailed Explanation
1	Create Idea	Click to add an idea on how to improve or enhance iQIES. The Create an Idea window opens.
2	All Ideas tab	This is the default tab and shows all user ideas that have been submitted.
3	My Ideas tab	Click this tab to show personal ideas submitted. The callouts for this tab are the same as the All Ideas tab.
4	? icon	Hover over for information on landing page selections.
5	Status	Filter on any status from the drop-down menu.
6	Category	Filter on any category from the drop-down menu.
7	Sort by	Sort the results by Recently Updated , Most Voted , or Created [date]. The default view is Recently Updated .
8	Results	The default view is the most recently updated ideas. Select a filter to return more specific results.
9	Upvote	Click the caret next to the idea to upvote an idea. Click the caret again to remove the upvote.
10	Subscribe/ Unsubscribe	Click Subscribe to subscribe to that idea. A weekly email is sent with any updates. Click Unsubscribe (shows only when the idea is subscribed to) to unsubscribe from an idea.
11	Comment	Click Comment to add a comment on that idea. Type a comment and then click Submit .
12	Top Voted Ideas	The top voted ideas are shown on the right side of the screen. Click any highlighted idea to view the idea.
13	CARL (Live Chat Support)	Click this bubble to start a live chat with an agent for assistance. Live Chat is available 9am– 5pm ET Agents are available by email and phone 8am-8pm ET

4. Submit an Idea

- 4.1 Click **Create Idea**. The **Create Idea** page opens. See *Figure 5, Create Idea, Top Section* and *Figure 6, Create an Idea, Bottom Section*.

Home > Create Idea

iQIES
IdeaPortal

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-1397 (Expires 07/31/2027). This is a voluntary information collection. The time required to complete this information collection is estimated to average 5 minutes per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850. ****CMS Disclosure**** Please do not send applications, claims, payments, medical records or any documents containing sensitive information to the PRA Reports Clearance Office. Please note that any correspondence not pertaining to the information collection burden approved under the associated OMB control number listed on this form will not be reviewed, forwarded, or retained. If you have questions or concerns regarding where to submit your documents, please contact Gladys Olomukoro at Gladys.Olomukoro@cms.hhs.gov

Create Idea

* Indicates required

* Title of idea

* Category

-- None --

* Idea description

Figure 5: Create Idea, Top Section

* How this idea will improve iQIES

Who/which roles will benefit from implementing this idea

Create Idea

Required information

Title of idea Category Idea description How this idea will improve iQIES

Add attachments

Figure 6: Create Idea, Bottom Section

- 4.2 Fill out the information.

Notes:

- Use the editor to format the words, if desired.
- Add links and attachments, if helpful.
- The **Required Information** must be provided before the Idea can be created.

4.3 Click **Create idea**. The page opens to the submitted idea.

4.4 Verify the green notification bar with **Idea was created successfully!** shows at the top of the screen with the idea ticket number. See *Figure 7, Idea Created Successfully Notification Bar*.



Figure 7: Idea Created Successfully Notification Bar

Notes:

- Return to **Idea Portal** landing page to view the newly-submitted idea on the list.
- An automatically-generated email is sent with a summary of submitted information.

5. View a Submitted Idea

Click an idea on the **Idea Portal** landing page. The submitted idea opens. See *Figure 8, Submitted Idea* and *Table 2, Submitted Idea Callout Details*

Note: All ideas can be viewed. It does not matter who submitted the idea.

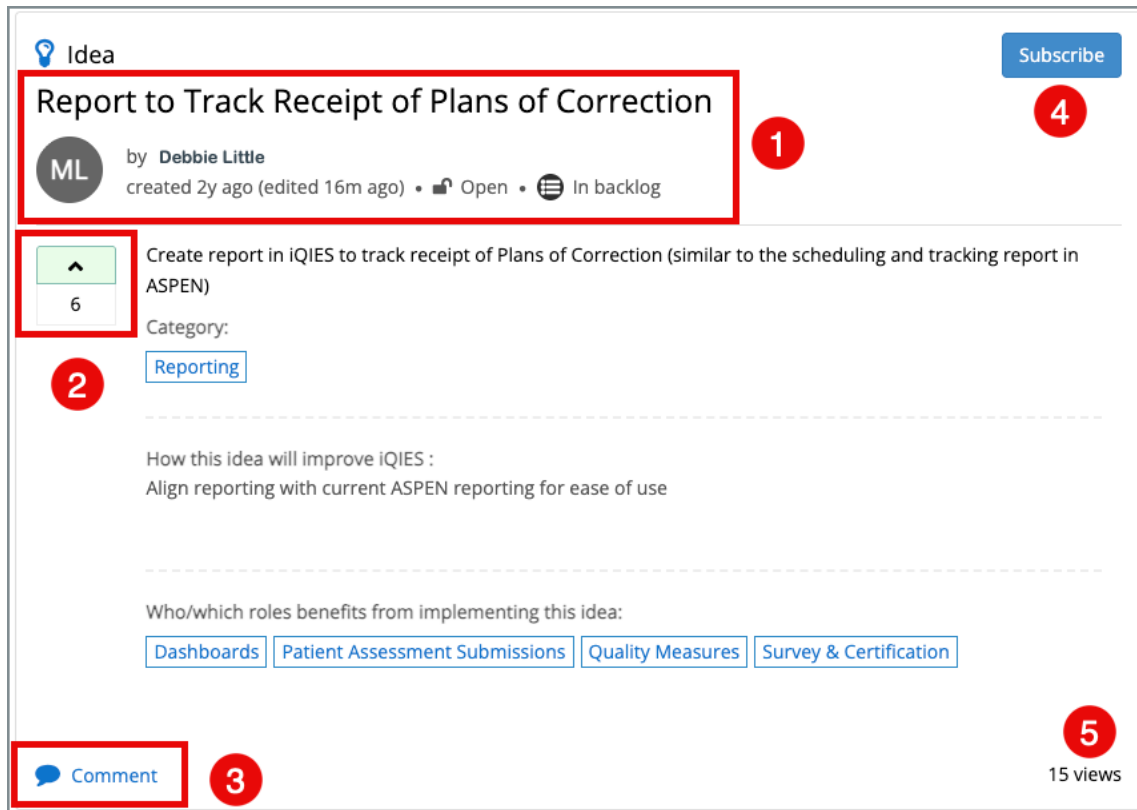


Figure 8: Submitted Idea

Table 2: Submitted Idea Callout Details

Callout	Detailed Explanation
1	<p>View the title of the submitted idea, the author, the create time, the status of the idea.</p> <p>All new ideas are in a Draft status until the team evaluates them.</p> <p>See Idea Status Details for more information.</p>
2	<p>Upvote an idea. Click upvote again to remove the upvote.</p> <p>It is only possible to vote on other people's ideas.</p> <p>Ideas cannot be upvoted that have the following statuses:</p> <ul style="list-style-type: none"> • Unlikely to Implement • Duplicate • Already Exists
3	<p>Click Comment to comment on the idea.</p> <p>Comments can come from any user.</p>
4	<p>Click Subscribe to track the idea and receive notifications when the idea undergoes updates.</p> <p>Click Unsubscribe to stop tracking the idea.</p> <p>Note: Unsubscribe only appears when the idea is currently subscribed.</p>
5	<p>Total views the idea has accumulated.</p>

6. Subscribe to an Idea

6.1 Go to the Idea Portal landing page.

6.2 Select the idea to subscribe.

Note: You can also subscribe to the idea from the submitted idea page.

6.3 Click **Subscribe**. See *Figure 9, Subscribe Button*.

Note: A weekly email is sent with any updates on the idea. Updates can include new upvotes, new comments, or a change in status.

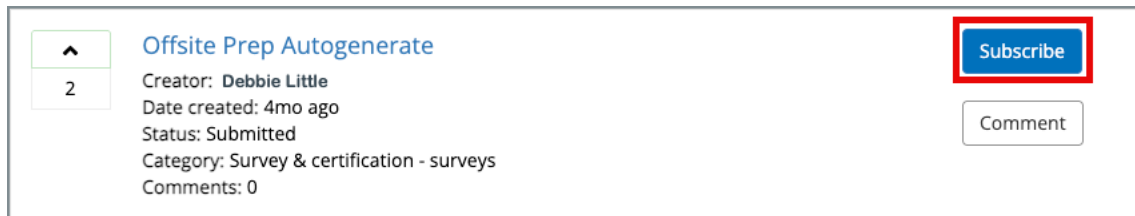


Figure 9: Subscribe Button

6.4 Click **Unsubscribe** to unsubscribe from an idea. See *Figure 10, Unsubscribe Button*.

Note: **Unsubscribe** only appears when the idea is currently subscribed.

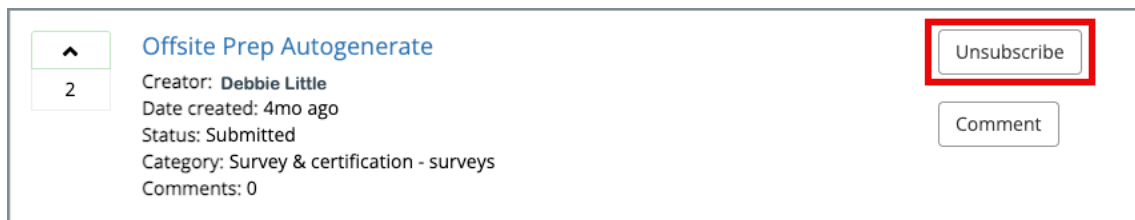


Figure 10: Unsubscribe Button

7. Comment on an Idea

- 7.1 Go to the Idea Portal landing page.
- 7.2 Select the idea to leave a comment.
- 7.3 Click **Comment**. See *Figure 11, Comment Button*.

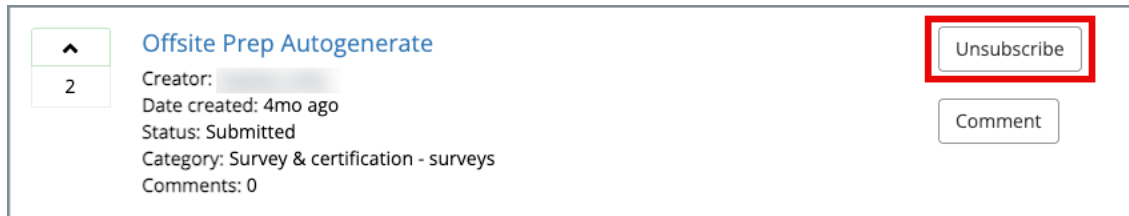


Figure 11: Comment Button

- 7.4 The **Comment on Idea** window opens. See *Figure 12, Comment on Idea window*.

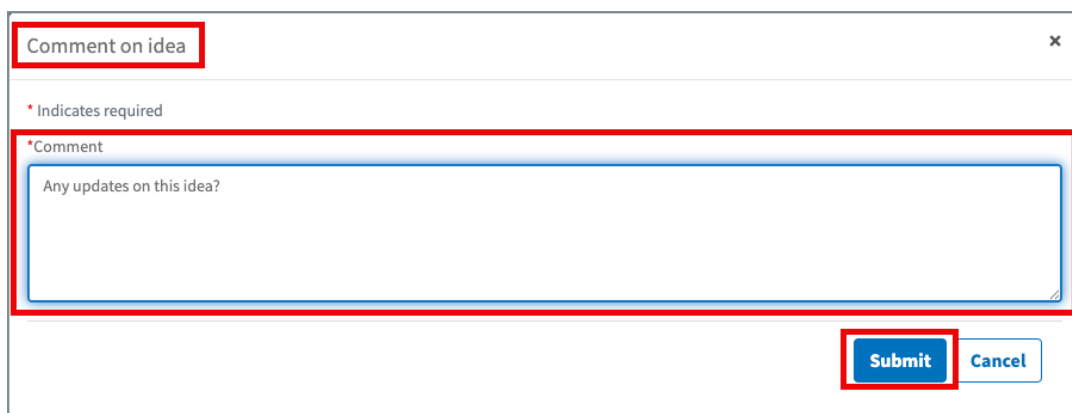


Figure 12: Comment on Idea Window

- 7.5 Type a comment in the field.
 - 7.6 Click **Submit** to post the comment.
- Note:** Once a comment is posted it cannot be deleted.

8. Idea Status Details

There are six (6) statuses that can be filtered for any submitted idea.

Draft	All submitted ideas are initially in Draft status. The status is changed once reviewed by the Idea Manager.
Submitted	The idea has been reviewed by the Idea Manager.
Need more information	The Idea Manager would like additional information. They will leave a comment with details of what they need.
Under Review	The Idea Manager and the iQIES Team are reviewing the idea to see if it is feasible.
In Backlog	The idea is getting closer to completion. It has moved into the iQIES Team's to-do list.
Planned	The idea is now planned for implementation.

There are other statuses that cannot be filtered and are applied by the Idea Manager once the idea has been reviewed. These statuses show that either the idea exists or is a duplicate of another submitted idea, the idea is already in development or completed, or the idea cannot be implemented.

Once one of these statuses has been applied, the idea can no longer be upvoted.

- **In Development**
- **Completed**
- **Unlikely to implement**
- **Duplicate**
- **Already exists**

Appendix A: FAQs

Questions

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Q. I sent an idea before the Idea Portal existed. Is it in the Idea Portal now?

Ideas submitted to the Service Center prior to Idea Portal will not be brought over to the Idea Portal. Please resubmit your idea to the Idea Portal.

Q. Why are there so many mandatory fields required for an idea?

The team is better able to understand ideas that have as much information as possible.

Q. I've submitted an idea. What happens next?

An Idea Manager validates the idea. In turn, the idea goes into our system and is discussed by the larger product development teams.

Q. Why is my idea in Draft status?

All new ideas are in a draft status until the team evaluates them. Then the status will be updated. [More on statuses here](#).

Q. Why hasn't my idea moved to a different status?

Statuses are updated when ideas have been fully reviewed.

All ideas are reviewed. Some ideas are already in the works and other times we need to wait for other updates before we can proceed. When other users upvoted your idea, the idea may be brought before the team to see if the idea can come to fruition sooner than planned.

Q. How do you track an idea after submission?

An automated email message is sent to you. The email gives [status updates](#). If you're following an idea that is not your own, you will also receive a weekly email status update on that idea.

Q. What does upvoting do?

Upvoting is a tool to support Product Development prioritization. Ideas with the highest upvoting represent which ideas are the most important to iQIES users. Usually, these ideas will be brought before the Prioritization Team sooner.

Q. Why can't I vote on my own idea?

Your vote counts when you create the idea. You can only vote on other people's ideas.

Q. Sometimes I can't vote on someone else's idea. What's going on?

You cannot upvote any ideas with the following statuses:

- **In Development**
- **Completed**
- **Unlikely to implement**
- **Duplicate**
- **Already exists**

Q. Can I look at someone else's Idea?

[All ideas are available to view.](#)

Q. What happens when I subscribe to someone else's Idea?

You receive weekly email notifications for that idea.

Q. Will the Idea Portal extend to other websites we use?

Possibly. If enough interest is shown, the Idea Portal could be expanded.

Q. Why did you build this thing?

CMS is passionate about listening to our users and creating a community atmosphere for collaboration to help support the development of iQIES.