Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Survey and Certification (S&C)

Letter Template Management

User Manual

Version 2.0

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1. Introduction

This S&C User Manual addresses Letter Template Management and shows how to create, edit, and use letter templates.

For information on other modules, refer to Reference & Manuals on QTSO.

1.1 Getting Started in S&C – Important Information to Know

Below is important general information about iQIES.

- Log in to iQIES at https://iqies.cms.gov/ with Health Care Quality Information Systems (HCQIS) Access Roles and Profile (HARP) login credentials. Refer to the iQIES Onboarding Guide for further information, if necessary.

- All screenshots included in this manual contain only test data. Current screens in iQIES may be different from what is shown in screenshots below.

- Screenshots are dependent on user role and may not be an exact representation.

- Words highlighted in blue are clickable links.

- A red asterisk (*) indicates a required field.

- Blank fields may have a limited number of characters allowed in that field. If so, the character limit is shown on the bottom left. The blank fields may also be expanded. Click the two 45° parallel lines and drag to the right to enlarge the box. See *Figure 1, Expandable Field*.
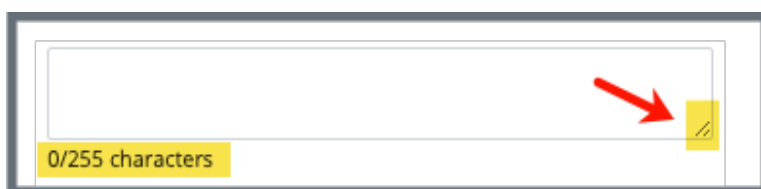

Figure 1: Expandable Field

- iQIES times out after 15 minutes of nonuse and reverts to the login page. Be sure to save data regularly. iQIES remains up and active as long as it is in use.

- iQIES uses a smart search. Once three letters/digits are typed in the search bar, results are shown based on the letters/digits entered. The more letters/digits entered, the narrower the search. If any of the results is the correct result, click the result to open.

- Review any notification banners. Some banners may have links to review further information; others may be a reminder of a task that must be completed. See *Figure 1, Notification Banner* and *Table 1, Notification Banner Color Descriptions.* These banners can be closed (X'd out) at any time.
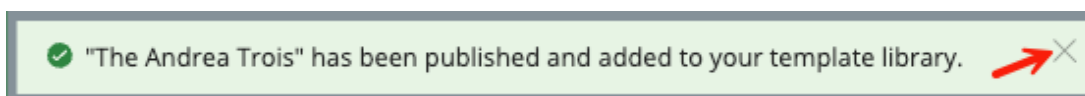
Figure 2: Notification Banner

Table 1: Notification Banner Color Descriptions

Notification Banner Color	Reason
Green	Action was successful
Blue	Informational only
Yellow	Warning. Review for information.
Red	Stop and review. The banner explains the actions must be taken.

- Review any Tool Tips for additional information to perform an action. Hover over the **i** icon to see the tip. Tool Tips are in iQIES to communicate information. Look for the information icon. See *Figure 2, Tool Tip Icon.*

Figure 3: Tool Tip Icon

- Below are the supported browsers for access to iQIES. Be sure to keep your browser updated.

  Chrome
  Edge

1.2 iQIES Service Center

The iQIES Service Center supports users working within the various iQIES components: S&C, Patient Assessment, and Reporting.

Assistance Accessing iQIES: Contact the iQIES Security Official (SO) for your organization

Technical Support: Contact the iQIES Service Center:
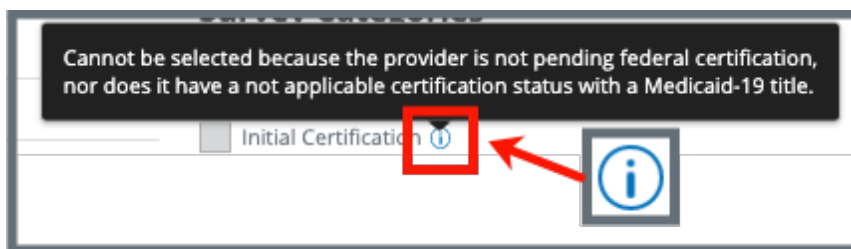
Phone: 888-477-7876 (select Option 1)
Email: iQIES@cms.hhs.gov

CCSQ Support Central: Create a new ticket or track an existing ticket: CCSQ Support Central.

Idea Portal: Feedback for future iQIES software development: CCSQ Support Central. Click **Idea Portals** and select **iQIES Idea Portal**.

More information on iQIES: Refer to the QIES Technical Support Office (QTSO) and the Quality, Safety, & Education Portal (QSEP). Logging in to HARP may be required before accessing some documentation in QTSO and QSEP.

iQIES reference materials include:

- Other volumes of the S&C User Manual
- Links to Training Videos for providers
- Assessment Management User Manual
- Quick Reference Guides
- Onboarding Guide
- Managing User Information
- Other helpful iQIES material

iQIES training materials on QSEP include S&C Foundation Series Videos

1.3 Roles and Permissions

iQIES roles allow users to access information pertinent to their area of work. The examples provided in this document pertain to S&C and require a State Agency S&C General User role and a Letters Administrator role or for CMS staff, a Centers for Medicare & Medicaid Services (CMS) role.

Permissions are ultimately governed by HARP access privileges. Contact the SO for your organization or the iQIES Service Center for issues relating to access and permissions. Refer to the iQIES User Roles Matrix for detailed information on roles.

For additional help, refer to https://iqies.cms.gov/iqies/help or click the help icon in the top right corner of the screen, see *Figure 3, Help Icon*, for further information.

Figure 4: Help Icon

2.   Letter Template Management Overview

A letter template provides standardized format and content for correspondence to customers. There are two types of templates: Standardized and Nonstandardized. These are explained in detail in [Create a New Template](#).

Notes:

- Letters are attached to the record in the specific provider, survey, intake, or enforcement.

- Templates cannot be shared across types (provider, survey, intake, enforcement).

- Batch letters are not currently supported.

- Refer to the Manage a Survey, Manage a Provider, Manage an Intake, or Manage an Enforcement [user manuals](#) for specific details, if needed.

3.   Letter Template Management Location

3.1   Go to **Administration** on the top menu.

3.2   Click the arrow and select **Letter Template Management** from the drop-down menu. See *Figure 4, Letter Template Management Drop-Down*. The **Template Library** page opens.
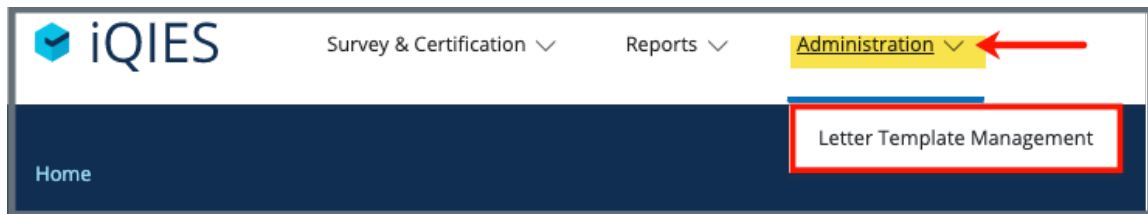

Figure 5: Letter Template Management Drop-Down

4.   Search for a Letter Template

Purpose: To search for drafts and published templates. An advanced search is available to search for a template based on chosen criteria.

Notes:

- There are four template types: **Provider**, **Survey**, **Intake**, **Enforcement**.

- Templates are associated with either a provider, survey, intake, or enforcement as they are dependent on the data in those records.

- The examples shown below are for the provider Templates. All four **Template Libraries** are set up the same way. Be sure to look on the tab that corresponds to the template needed.

4.1   Type template name or any keyword into search box. See *Figure 5, Search for a Template*.

4.2   Click **Search**. A list of templates appears below.

Figure 6: Search for a Template

Notes:

- Template names and descriptions can be sorted in alphabetical or reverse alphabetical order. Click the arrows next to the heading to sort. The headings are:

  o **ID**
  o **Name**
  o **Status** (Draft, Published, Archived)
  o **Template Type**
  o **Provider Type**
  o **Marginal Type** (content, header, footer)
  o **Last Used Date**
  o **Actions** (Duplicate, Archive)

- Click **Show Advanced Search** for a more detailed search. Refer to steps 4.3 and 4.4 below.

4.3   Click **Show Advanced Search**, if desired, to open the **Advanced Search** drop-down menu and narrow the search criteria. See *Figure 6, Advanced Search*.

4.4   Type in desired detailed criteria. Click **Search**. The templates show below.

   Note: Click **Hide Advanced Search** to close the **Advanced Search** menu.

Figure 7: Advanced Search

5. Create a New Template

Purpose: To create a template that can be used in both standardized and nonstandardized letters. A template can be a letter or a header or footer.

Nonstandardized State Letter Templates:

- Reside in iQIES for a specific state
- Can be accessed and changed by any State Agency General User (SAGU) with the appropriate permissions for the specific state

Nonstandardized Federal Letter Templates:

- Can be accessed with the appropriate permissions for a particular state
- Can be changed by any CMS General User (CMSGU).

Standardized templates:

Can be accessed and edited by any user for that state with the appropriate permissions in Letter Template Management. See Attach a Template to a Record for more information.

5.1 Click **Create New Template** on top right of window. The **Create a new template** pop-up window opens. See *Figure 7, Create a New Template*.

Figure 8: Create a New Template

5.2   Fill in the fields. See *Table 2, New Template Field Descriptions* for details of
       the fields.

Table 2: New Template Field Descriptions

Template Field	Description
ID	A unique ID that is selected for templates. The system gives the template a random 4-digit/letter ID, but that ID can be changed, if desired.
Template Name	Type the name of the template
Standardized Template	Click the box next to **Standardized Template** to create a template that cannot be changed when generating a letter. Textholders may be updated, but other content cannot be changed. The template can be edited in the **Letter Template Management** section.
Description	Type a brief description of the template so it can be easily found during a search
Marginal Type	Select the type of template. Selections vary depending on choice.
Content	This template is a letter. The following fields appear when **Content** is selected: **Template Type**, **Header**, **Footer**
Header/Footer	This template is either just a header or just a footer. It can be added to content templates to create other templates. Both the header and footer are created at the top of the page. They will appear correctly when added to a letter template.

Template Field	Description
Template Type	Select from **Provider**, **Survey**, **Intake**, or **Enforcement. Template Type** cannot be edited after the template is saved.
Header/Footer	Select from the drop-down menu
Provider Type	**All** is the default selection. Delete **All** to view the drop-down menu of individual selections. **Provider Type** cannot be edited after the template is saved.
State	Select from the drop-down menu. The state cannot be edited after the template is saved. Duplicate the letter to create a letter for more than one state.

5.3   Click **Save**. The newly-created letter template opens. See *Figure 8, Letter Template Parts Explanation*.
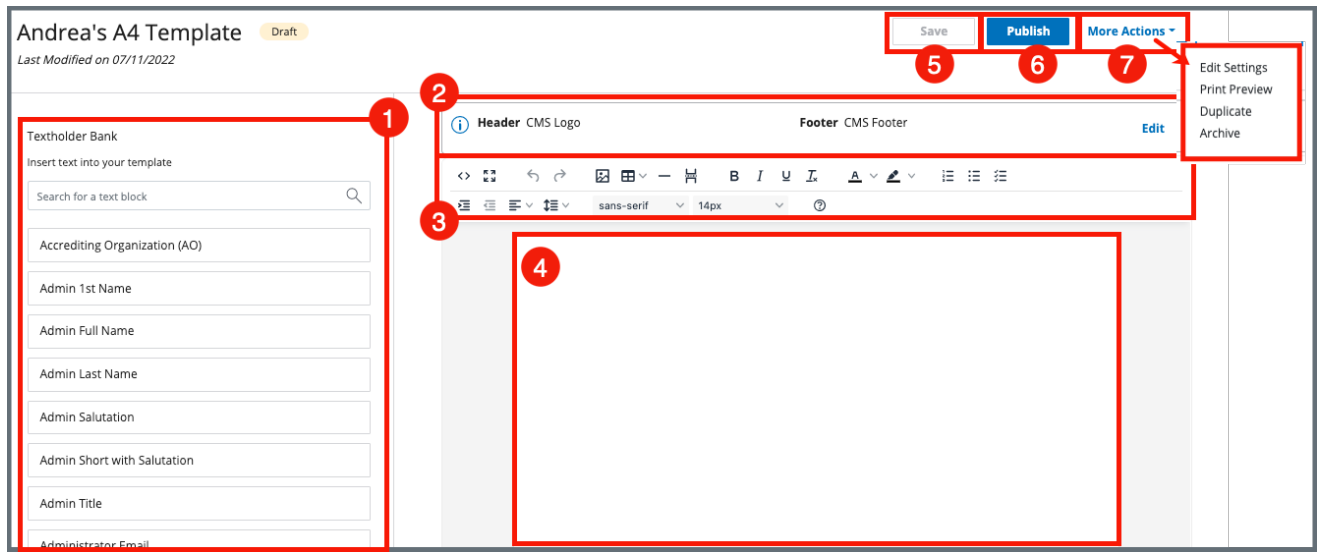
Figure 9: Letter Template Parts Explanation

1. **Textholder Bank**: This is a list of all the textholders that can be added to the letter template. Each textholder represents data specific to the provider, survey, intake, or enforcement area. The list is specific to each area and is in alphabetical order. Type the first few letters of desired text in the **Search** box to search for a specific textholder. Textholders for each area are located in Appendices B-E.

2. **Header/Footer/Edit**: Headers and footers are noted here if they are used. Click **Edit** to edit the template header, footer, ID, name, or description. The **Edit Settings** window opens and can be edited.

3. **Editor**: Allows content to be edited, including formatting, bulleting, etc.

4. **Letter Template**: This is the letter template to be created. Add textholders for data.

5. **Save**: Save as a draft.

6. **Publish**: Publish to add to template library for use.

7. **More Actions**:

   - **Edit Settings** updates template settings
   - **Print Preview** shows print preview
   - **Duplicate** copies the template

- **Archive** removes template from circulation. The template cannot be used, but it can be reinstated. See Archive a Template, for further information.

- **Return as Draft** is used when an active or archived template needs to be edited. The template can be republished when needed. It is not available for use until it is republished.

5.4   Click the image icon at the top of the template to add a logo, if desired. The **Insert/Edit Image** window pops up.

5.5   Click **Upload**. Drag and drop a logo/picture into the **Drop an image here** box or click **Browse** for an image to upload an image from the computer.

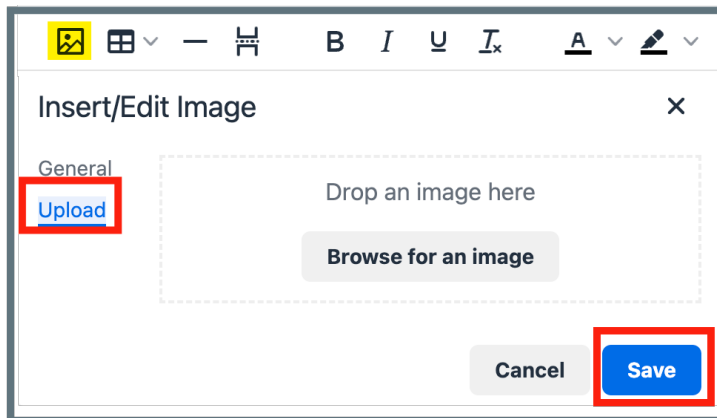5.6   Click **Save**. See *Figure 9, Upload Image*.

Figure 10: Upload Image

Notes:

- The **General** tab automatically displays the **Source** location of the image. Do not edit the location as this interferes with the upload process.

- A logo can be copied and pasted into the letter template.

5.7   Create the template in the text box. Put cursor in desired area to add information.

5.8   Type the template information or copy and paste from an existing document.

> **Note**: Create the template as it is done in any word processing program. Type words, copy text from existing documents and paste in the text box, format the text, etc. See Appendix A, Tips and Tricks for Creating a Template.

5.9   Select from **Textholder Bank** for record data to be inserted. Click any textholder to insert it in the document.

> **Notes**:

- Textholder data is automatically inserted in the template when the letter is generated for use. See Appendices B-E for a list of textholders for each specific provider, survey, intake, or enforcement area.

- Custom textholders can be created with the **Custom Text Prompt** from the Textholder Bank. Review Custom Text Prompts for more information.

5.10   Click **Save** to save as a draft.

5.11   Click **Publish** to publish template.

> **Note**: **Publish** makes the template available for any users in the **Letters** section specific to each of the provider, survey, intake, or enforcement area, i.e., a letter can now be created with the template. See Attach a Template to a Record for more information on how to create a letter with a template, if necessary.

6. Edit a Template

Purpose: To edit an existing template.

Notes:

- To make updates in a nonstandardized template, refer to Attach a Template to a Record.

- **Marginal Type, Template Type**, and **Provider Type** cannot be edited after the template is saved.

6.1   Click the desired template under **Name** from the **Template Library**. The template opens.

6.2   Click **Edit** to edit template ID, name, description, header, or footer. See *Figure 10, Edit a Template*. The **Edit Settings** window pops up.
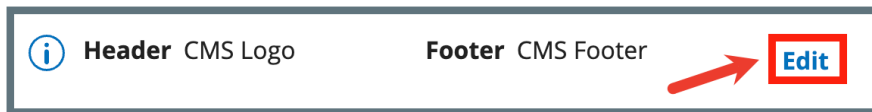

Figure 11: Edit a Template

Note: Select **Edit Settings** from the **More Actions** drop-down menu to open the **Edit Settings** window.

6.3   Update the template as desired.

6.4   Click **Save** to save as a draft.

6.5   Click **Publish** to publish template.

7.   Duplicate a Template

Purpose: To duplicate an existing template for use in another area.

Notes:

- **Marginal Type, Template Type,** and **Provider Type** cannot be edited after the template is saved.

- Standardized templates can be duplicated.

7.1   Select **Duplicate** from the **More Actions** drop-down menu. See *Figure 11, Duplicate a Template*. The **Edit Settings** window pops up.
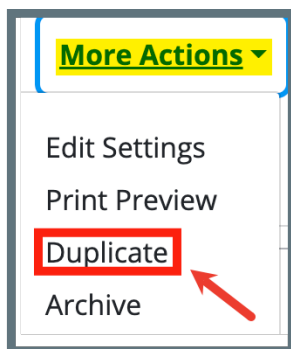

Figure 12: Duplicate a Template

7.1   Rename the template.

7.2   Update the fields as needed.

7.3   Click **Save**. The **Letter Template Management** page opens and the letter can be edited.

7.4   Click **Save** to save the template as a draft.

7.5   Click **Publish** to publish the template.

8. Archive a Template

Purpose: To archive templates so that the template cannot be used.

Notes:

- Templates cannot be deleted. Archived templates can be reinstated for use if needed.

- Any user with Letter Template Administration permission can archive a template. Double check any template before archiving.

8.1 Select **Archive** from the **More Actions** drop-down menu. See *Figure 12, Archive a Template*. The **Are you sure?** window pops up.
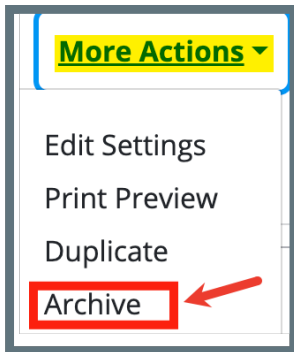

Figure 13: Archive a Template

8.2 Click **Yes, archive**. See *Figure 13, Are you sure? Pop-up Window*. The **Letter Template Archived Notification** opens. See *Figure 14, Letter Template Archived Notification*.
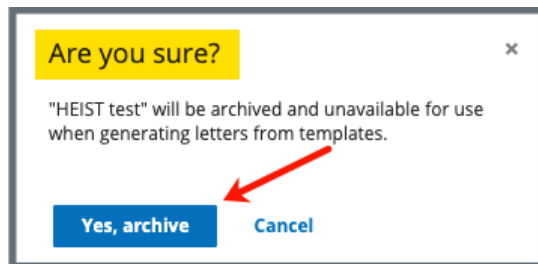

Figure 14: Are you sure? Pop-up Window

✅ "HEIST test" has been archived and is unavailable for use when generating letters from template.
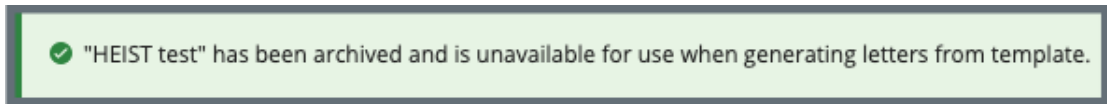
Figure 15: Letter Template Archived Notification

8.3   Reinstate an archived template.

    8.3.1 Go to the **Template Library**.

    8.3.2 Click **Show Advanced Search**.

    8.3.3 Click **Archived** under **Status**.

    8.3.4 Click **Search**.

    8.3.5 Select the template to be reinstated.

    8.3.6 Select **Publish** or **Return as draft** from the drop-down menu under **More Actions**.

9.   Attach a Template to a Record

Purpose: To attach an existing published letter template to the corresponding provider, survey, intake or enforcement record.

9.1   Go to the specific provider, survey, intake, or enforcement record with which the letter is associated.

9.2   Click **View Details**. The **Details** page opens.

9.3   Click **Letters** on the left menu. The **Letters** page opens.

9.4   Click **Add Letter**. The **Letter Overview** page opens.

   Note: If there is already an existing letter that can be reused, click **Generate from template** under the **Actions** drop-down menu and go to step 9.7.

9.5   Type the letter name under **Letter Name**. Add additional information, if desired.

9.6   Click **Save**. The **Letter: [Template Name]** page opens.

9.7   Click **Generate from template** under **Attachments**. The **Select a template** page opens.

   Note: Scroll down to view the **Attachments** section.

9.8   Click the circle next to the desired template. See *Figure 15, Select a Template*.
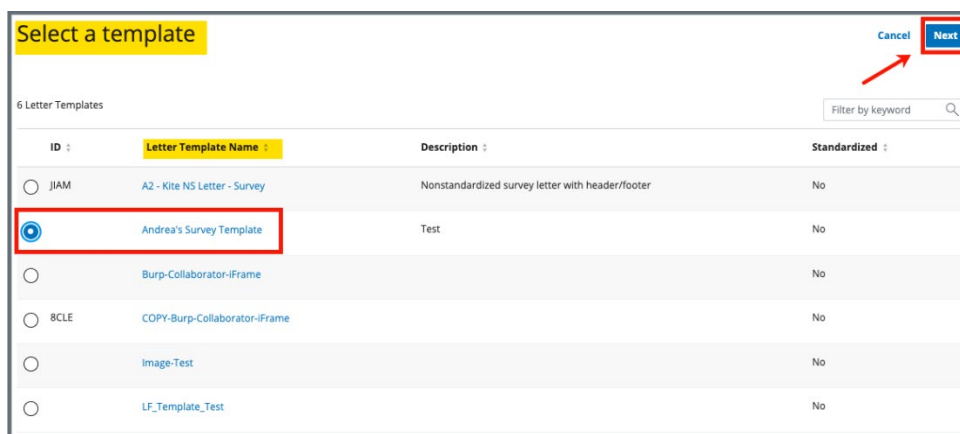

Figure 16: Select a Template

9.9   Click **Next**. The **Generate attachment from template** page opens.

9.10   Update the template as desired. See *Figure 16, Letter Template*.

        Notes:

        - Nonstandardized templates can be modified by any user.

        - Textholders can be removed, words can be edited and updated.

        - Text changes apply only to the current letter and not to the template. Refer to Edit a Template to edit the original template, if necessary.

        - Standardized templates cannot be modified in the **Letters** section of any S&C area (provider, survey, intake, enforcement). Modify a standardized template in **Letter Template Management**.

Figure 17: Letter Template

1. **Print Preview**: Click **Print Preview** to preview the .pdf version of the letter. The letter can be downloaded from **Print Preview**, if desired.

2. **File Name**: Edit the template name.

3. **Description**: Enter keywords, if desired. Keywords are descriptive words that help the user find the content.

4. **Editor**: The Editor allows content to be edited, including formatting, bulleting, etc. See Appendix A, Tips and Tricks for Working in a Template, for up-to-date details on each icon in the editor.

5. **Letter**: Shows how the letter looks when generated.

6. **Generate attachment**: Click **Generate attachment** to create a .pdf that attaches to provider/survey/intake/enforcement record.

9.11   Click **Generate Attachment** to attach the letter to the record.

9.12   Verify the letter is attached under **File Name**. See *Figure 17, Letter Attachment*.
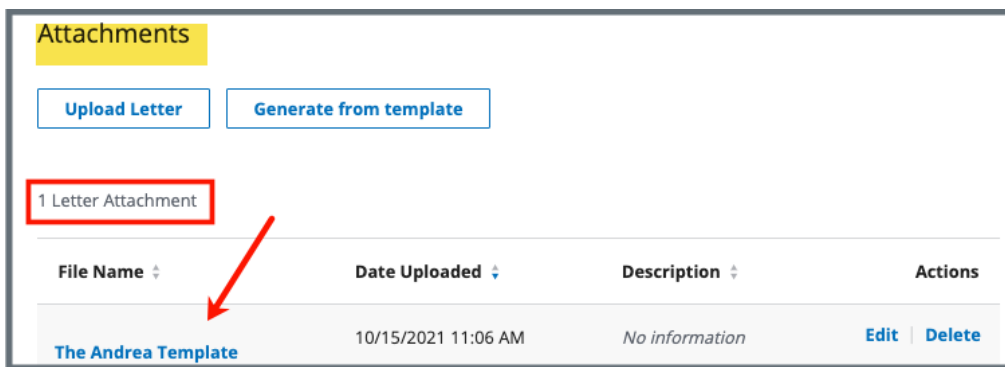
Figure 18: Letter Attachment

10. Create a Custom Text Prompt

Purpose: To create a custom textholder when it is necessary to add unknown specific information to a standardized letter. This prompt pops up when the template is attached to its corresponding record and the desired data can then be added.

10.1   Open the letter template where the custom textholder needs to be added.

10.2   Select area in template where desired custom textholder will be inserted.
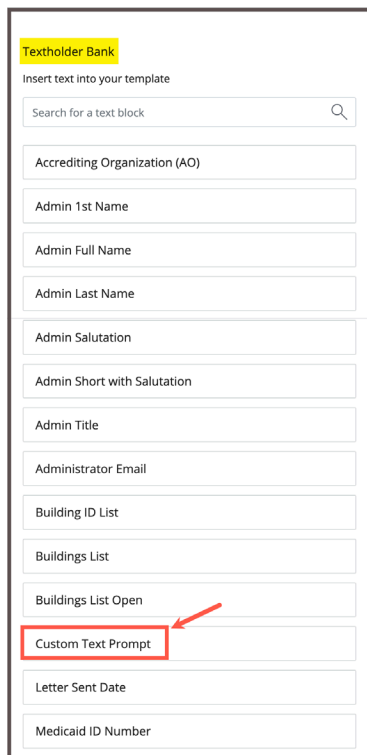
Note:

More than one custom textholder can be added to a letter template.

10.3   Click **Custom Text Prompt** from **Textholder Bank**. See *Figure 18, Custom Text Prompt Location*.

Notes:

- The letter template must be attached to the corresponding provider, survey, intake or enforcement record for the custom text prompt to generate the accurate data it represents.

- See Appendices B-E for a list of other textholders for each specific provider, survey, intake, or enforcement area.

Figure 19: Custom Text Prompt Location

10.4   Edit the **User entered prompt** in the **Custom Text Prompt** formula with desired data. See *Figure 19, Edit Custom Text Prompt*.

Notes:

- Do not remove the quotation marks in the **Custom Text Prompt** formula.

- The **Custom Text Prompt** appears as an editable formula in the body of the letter.
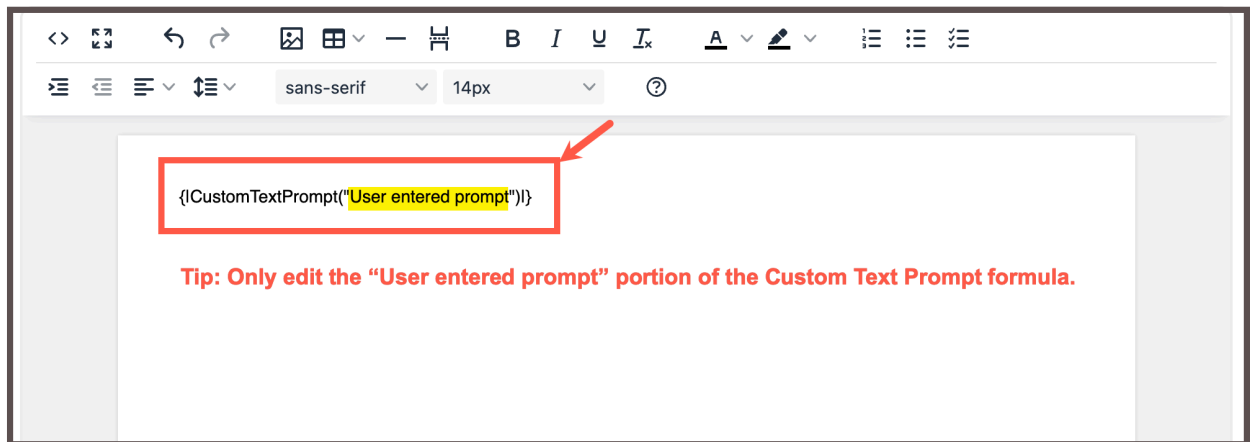
Figure 20: Edit Custom Text Prompt

10.5   Click **Save** to save template.

10.6   Attach the letter template to its corresponding provider, survey, intake or enforcement record.

  10.6.1   Go to the specific provider, survey, intake, or enforcement record with which the letter is associated.

  10.6.2   Click **View Details**. The **Details** page opens.

  10.6.3   Click **Letters** on the left menu. The **Letters** page opens.

  10.6.4   Click **Add Letter**. The **Letter Overview** page opens.

  10.6.5   Type the letter name under **Letter Name**. Add additional information, if desired.

  10.6.6   Click **Save**. The **Letter: [Template Name]** page opens.

  10.6.7   Click **Generate from template** under **Attachments**. The **Select a template page** opens.

  10.6.8   Click the circle next to the desired template.

  10.6.9   Click **Next**.

  10.6.10 The **Enter Custom Textholder Text** window pops up. See *Figure 20, Enter Custom Textholder Text Pop-Up Window*.

  10.6.11 Complete the prompt(s).

  10.6.12 Click **Apply**.

10.6.13   The **Generate attachment from template page** opens.
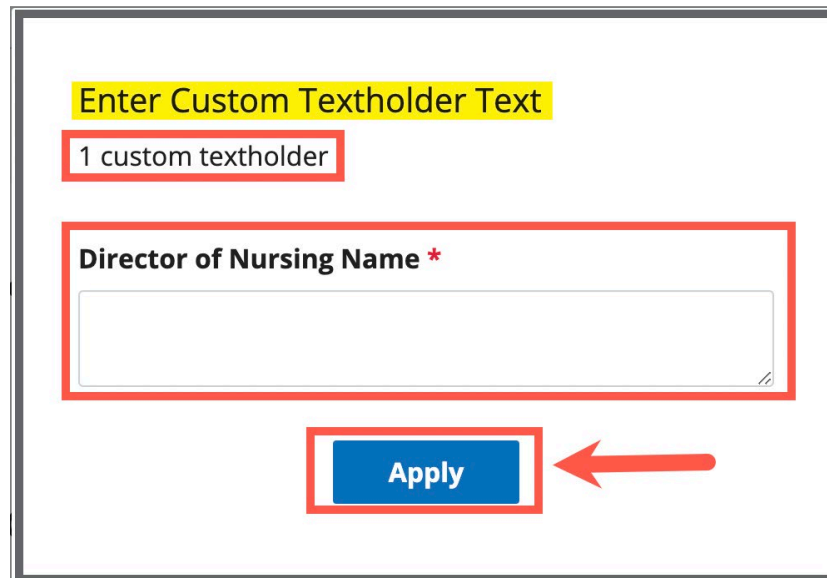
Figure 21: Enter Custom Textholder Text Pop-Up Window

10.6.14 Click **Generate Attachment** to attach the letter to the record.

Appendix A: Tips and Tricks for Working in a Template

The letters template is very similar to working in Google Docs or Microsoft Word. Here are a few tips and tricks to help:

Template Menu
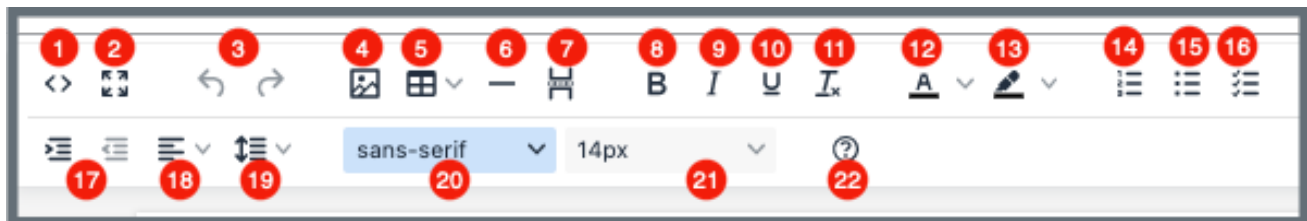
Figure 22: Template Menu

Hover over the template menu to see screen tips on what each of these icons are:

1. Show HTML code
2. Put document in full screen (make it bigger)
3. Undo/Redo
4. Insert an image. A small **Drop image** box opens. Drag and drop a file or click the box and search for the file.
5. Insert a table
6. Insert a horizontal line
7. Insert a page break
8. Highlight text and click to make **bold**
9. Highlight text and click to *italicize*
10. Highlight text and click to underline
11. Clear formatting
12. Highlight text and click to change text color
13. Highlight text and click to highlight text
14. Create a numbered list
15. Create a bulleted list
16. Insert a checklist
17. Indent/Remove indent
18. Alignment: Left, Center, Right, Justified
19. Adjust the line height
20. Select a font
21. Select a font size
22. Help: shows handy shortcuts, keyboard navigation, plugins and version

Appendix B: Provider Textholder Text

Each provider, survey, intake, or enforcement area has area-appropriate textholders. Provider Textholders are listed below.

Provider Textholders		
Accrediting Organization (AO)	Facility Telephone	Provider State
Admin 1st Name	Letter Sent Date	Provider State ID (FACID)
Admin Full Name	Medicaid ID Number	Provider State License Number
Admin Last Name	Provider Address 1 (Street)	Provider Telephone
Admin Salutation	Provider Address 2	Provider Type Abbrev
Admin Short with Salutation	Provider CCN	Provider Type Full Description
Admin Title	Provider City	Provider Zip
Administrator Email	Provider Doing Business As	Title (Mapped from Provider Certification & Licensure tab)
Building ID List	Provider Fax Number	Today's Date
Buildings List	Provider Full Address	Today's Date Full
Buildings List Open	Provider Legal Name	
Custom Text Prompt	Provider Mailing Address	

Appendix C: Survey Textholder Text

Each provider, survey, intake, enforcement area has area-appropriate textholders. Survey Textholders are listed below.

Survey Textholders		
Accrediting Organization (AO)	IDR Conducted By	Provider Type Full Description
Admin 1st Name	IDR Conducted Date	Provider Zip
Admin Full Name	IJ Citations	Revisit-Corrected Tags
Admin Last Name	Letter Sent Date	Revisit-List New Tags
Admin Salutation	List Intakes For This Survey	Revisit-List Repeat Tags
Admin Short with Salutation	List Level A Cites (Disabled for HHA)	SQC Highest Grid Text
Admin Title	List Survey Team	SQC Notification
Administrator Email	List Tag Numbers Only	Start Date (Numbers)
Building ID List	List Tag/Surveyor Test	Start Date (Words)
Buildings List	List Tags Cited	State Survey Categories
Buildings List Open	Medicaid ID Number	Survey All Tags IDR Status
Custom Text Prompt	Observation Text (9999)	Survey Extent(s)
Date # Days after Exit Date (Numbers)	POC Due Date	Survey High Citations
Date # Days after Exit Date (Words)	POC Due Date in Words	Survey Purpose
Date # Days after Start Date (Numbers)	Provider Address 1 (Street)	Survey Regulation Type

Survey Textholders		
Date # Days after Start Date (Words)	Provider Address 2	Survey Revisits
Date CMS-2567 Issued	Provider CCN	Survey Revisits – Dates Only
Date IDR Request Received	Provider City	Survey Team Leader
Event ID	Provider Doing Business As Name	Survey Type
Exit Date (Numbers)	Provider Fax Number	Tags above S/S C
Exit Date (Words)	Provider Full Address	Tags with SQC
Exit Date + 6 Months (Numbers)	Provider Legal Name	Third Visit Date
Exit Date + 6 Months (Words)	Provider Mailing Address	Title (Mapped from Provider Certification & Licensure tab)
Federal Survey Categories	Provider State	Today's Date
First Revisit High Citations	Provider State ID (FACID)	Today's Date Full
First Revisit High Cite S/S	Provider State License Number	Waived Tags of Survey
Highest Grid Text	Provider Telephone	
Highest Scope/Severity (Disabled for Home Health Agencies (HHA))	Provider Type Abbrev	

Appendix D: Intake Textholder Text

Each provider, survey, intake, enforcement area has area-appropriate textholders. Intake Textholders are listed below.

Intake Textholders		
ALL – Allegation Text [with redact]	Event ID	Provider Full Address
Accrediting Organization (AO)	Exit Date (Numbers)	Provider Legal Name
Acknowledged	Exit Date (Words)	Provider Mailing Address
Activity Assignees	Exit Date + 6 Months (Numbers)	Provider State
Admin 1st Name	Exit Date + 6 Months (Words)	Provider State ID (FACID)
Admin Full Name	Federal Survey Categories	Provider State License Number
Admin Last Name	First Revisit High Citations	Provider Telephone
Admin Salutation	Highest Scope/Severity (Disabled for HHA)	Provider Type Abbrev
Admin Short with Salutation	IDR Conducted By	Provider Type Full Description
Admin Title	IDR Conducted Date	Provider Zip
Administrator Email	IJ Citations	Reference
ALL – Allegation Text [without redact]	Intake ID/Complaint Number	Revisit-Corrected Tags
Allegation Category	Intake Recipient	Revisit-List New Tags
Alleged Event Date	Investigation Due Date	Revisit-List Repeat Tags

Intake Textholders		
Building ID List	Investigation Due Date Long	Start Date (Numbers)
Buildings List	Investigators	Start Date (Words)
Buildings List Open	Letter Sent Date	State Intake ID
Complainant Address	List Intakes For This Survey	State Survey Categories
Complainant Names	List Level A Cites (Disabled for HHA)	Survey All Tags IDR Status
Complainant Relationship (Primary)	List Survey Team	Survey Extent(s)
Custom Text Prompt	List Tag Numbers Only	Survey High Citations
Date # Days after Exit Date (Numbers)	List Tag/Surveyor Test	Survey Purpose
Date # Days after Exit Date (Words)	List Tags Cited	Survey Regulation Type
Date # Days after Intake Date (Numbers)	Medicaid ID Number	Survey Revisits
Date # Days after Intake Date (Words)	Observation Text (9999)	Survey Revisits – Dates Only
Date # Days after Start Date (Numbers)	POC Due Date	Survey Team Leader
Date # Days after Start Date (Words)	POC Due Date in Words	Survey Type
Date # Days in Future (Numbers)	Primary Complainant	Termination – 23 Days
Date # Days in Future (Words)	Provider Address 1 (Street)	Termination – 90 Days
Date # Working Days	Provider Address 2	Third Visit Date

Intake Textholders		
Date CMS-2567 Issued	Provider CCN	Title (Mapped from Provider Certification & Licensure tab)
Date Follow-up Investigation	Provider City	Today's Date
Date IDR Request Received	Provider Doing Business As Name	Today's Date Full
Date Received/Intake Start Date	Provider Fax Number	

Appendix E: Enforcement Textholder Text

Each provider, survey, intake, enforcement area has area-appropriate textholders. Enforcement Textholders are listed below.

Enforcement Textholders		
Accrediting Organization (AO)	Federal CMP Amount Due	Provider State ID (FACID)
Admin 1st Name	Federal CMP(s)	Provider State License Number
Admin Full Name	Latest Denial of Payment Remedy	Provider Telephone
Admin Last Name	Letter Sent Date	Provider Type Abbrev
Admin Salutation	Medicaid ID Number	Provider Type Full Description
Admin Short with Salutation	NATCEP/Nurse Aide Training Ban Last Loss Date	Provider Zip
Admin Title	NATCEP/Nurse Aide Training Ban Loss Date	Recommended Federal CMP(s)
Administrator Email	Next Licensure Letter Remedies	Remedies with State Recommended Effective Date
All CMPs	Per Day CMP(s)	Remedy List
Building ID List	Per Instance CMP(s)	Remedy List – All Federal
Buildings List	Provider Address 1 (Street)	Remedy List – In Effect
Buildings List Open	Provider Address 2	Remedy List – Not in Effect
Changes from IDR	Provider CCN	Remedy List – Pending

Enforcement Textholders		
Changes from IDR (No Status)	Provider City	Remedy List – Recommended
CMP Collection Number	Provider Doing Business As Name	Survey High Citations
CMP First CMS Notice Date	Provider Fax Number	Title (Mapped from Provider Certification & Licensure tab)
Custom Text Prompt	Provider Full Address	Today's Date
Cycle Start + 3 Months	Provider Legal Name	Today's Date Full
Cycle Start + 6 Months	Provider Mailing Address	
Date Facility out of Compliance	Provider State	