



**Centers for Medicare & Medicaid Services**

# **Internet Quality Improvement Evaluation System (iQIES)**

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## **Survey and Certification (S&C) Dashboards User Manual**

**Version 1.0**

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# 1. Introduction

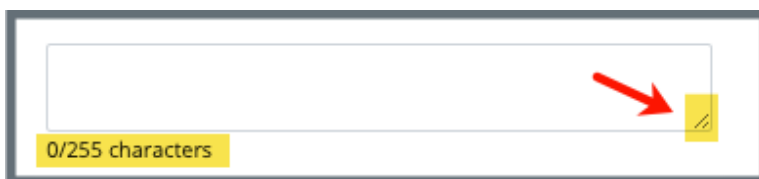
This user manual addresses how to access Dashboards in iQIES. The **Acute Continuing Care Survey and Certification** and the **Top Ten Submission Errors Dashboard** are the only available Dashboards at present, but additional dashboards related to Survey and Certification will be released in iQIES over the next few months.

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.

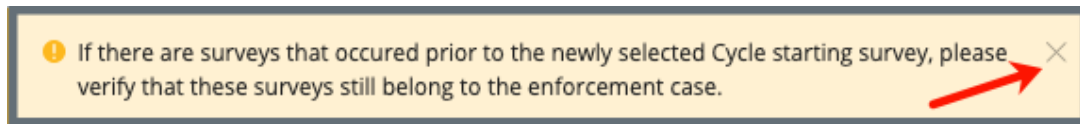
- Log in to iQIES at <https://iqies.cms.gov/> with Health Care Quality Information Systems (HCQIS) Access Roles and Profile ([HARP](#)) login credentials. Refer to the [iQIES Onboarding Guide](#) for further information, if necessary.
- All screenshots included in this manual contain only test data. 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*

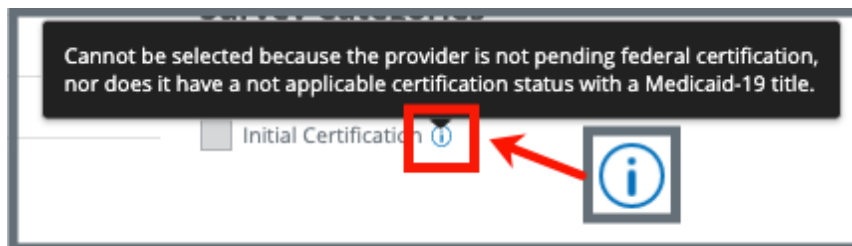
- iQIES times out after 15 minutes of nonuse and reverts to the login page. Be sure to save data regularly. iQIES remains up and active as long as it is in use.

- iQIES uses a smart search. Once three letters/digits are typed in the search bar, results are shown based on 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 yellow/orange notification banners. See *Figure 2, Notification Banner*. These banners can be closed (X'd out) if they do not apply or they are resolved.



*Figure 2: Notification Banner*

- 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 3, Tool Tip Icon*.



*Figure 3: Tool Tip Icon*

- Below are the supported browsers for access to iQIES. **Do not use Internet Explorer.** It is not supported. Be sure to keep your browser updated.

For best results, please use the latest version of these browsers:

[Chrome](#)

[Firefox](#)

The latest versions of the browsers below are also supported:

[Microsoft Edge](#)

[Safari](#)

## 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](mailto:iQIES@cms.hhs.gov)

**CCSQ Support Central:** Create a new ticket or track an existing ticket:  
[https://cmsqualitysupport.servicenow.com/ccsq\\_support\\_central](https://cmsqualitysupport.servicenow.com/ccsq_support_central)

**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:

- 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 or Centers for Medicare & Medicaid Services (CMS) role with the capability to view or edit this information.

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 4, Help Icon*, for further information.



*Figure 4: Help Icon*

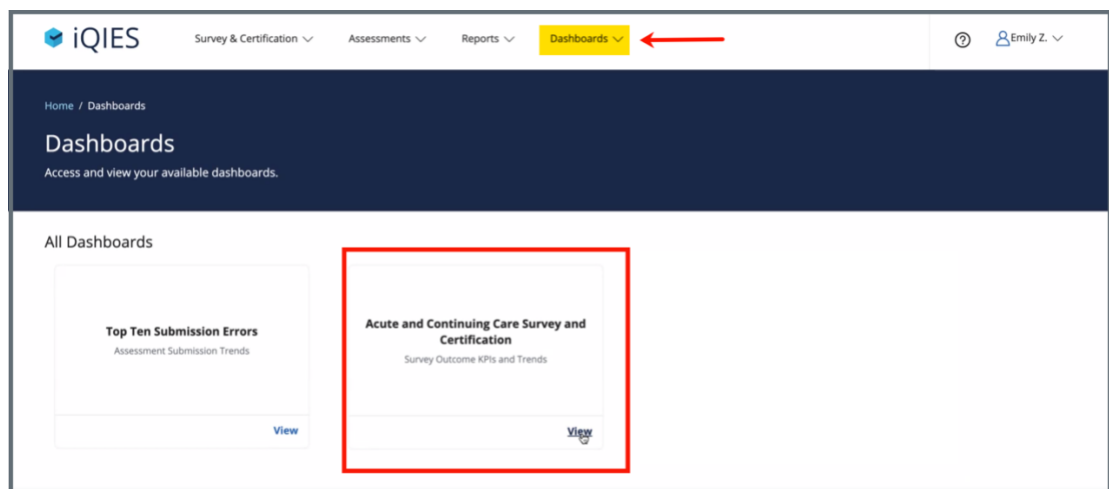
## 2. Dashboards

This section explains how to access Dashboards in iQIES. The **Acute and Continuing Care Survey and Certification** and the **Top Ten Submission Errors Dashboard** are the only available Dashboards at present, but additional dashboards related to Survey and Certification will be released in iQIES over the next few months.

This section applies to the **Acute and Continuing Care Survey and Certification Dashboard**.

### 2.1 Open the Dashboard

- 2.1.1 Go to **Dashboards** at the top of the iQIES home page. Click the arrow to open the drop-down menu.
- 2.1.2 Click **Dashboards Main**. The **Dashboards** screen opens. *See Figure 5, Dashboards Main Page.* This page will list all dashboards available to your user role.

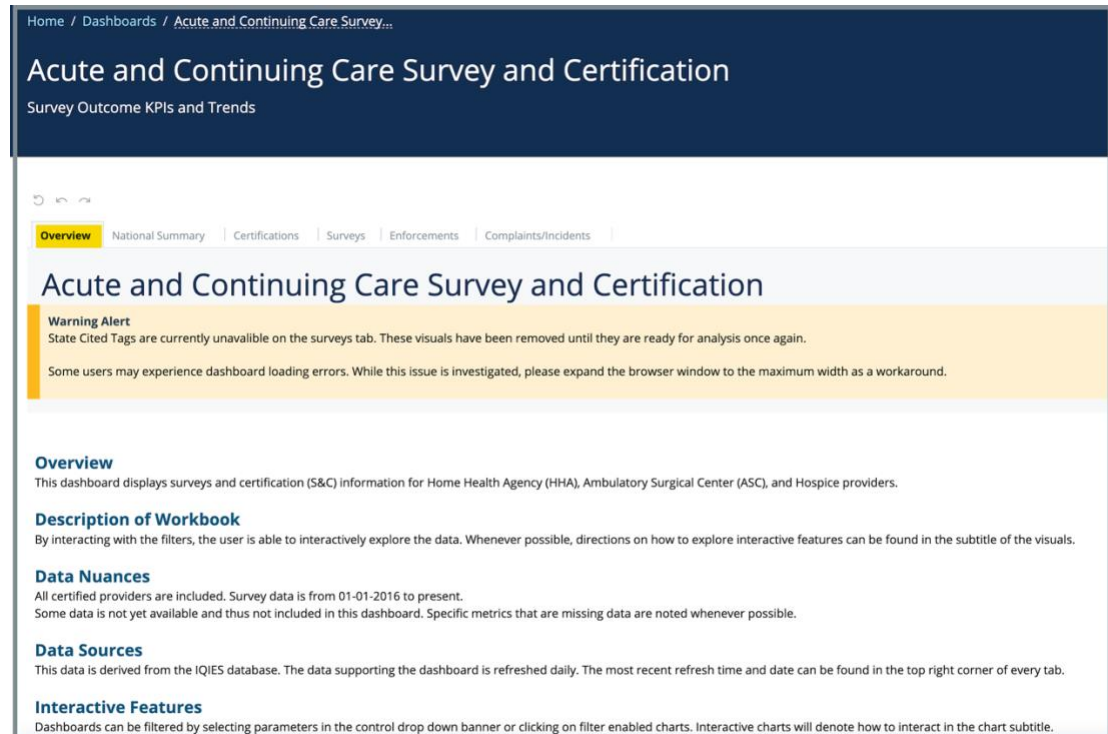


*Figure 5: Dashboards Main Page*

- 2.1.3 Click **View** to select Acute and Continuing Care (ACC) Survey and Certification (S&C) Dashboard. The ACC S&C Dashboard opens on the **Overview** tab. *See Figure 6, Acute and Continuing Care Survey and Certification Dashboard.*

**Note:** Most dashboards contain multiple tabs.





*Figure 6: Acute and Continuing Care Survey and Certification Dashboard*

## 2.2 Overview Landing Tab

**Purpose:** A high-level summary of how the dashboard can be used, where the data is sourced, and how often the data is refreshed.

**Updates:** Shows recently added features.

## 2.3 Controls

**Overview:** The **Controls** menu can be changed from any tab except **Overview**. Any changes are valid for each tab. For example, if the **Provider Type** chosen is **Home Health Agency**, each tab then only shows **Home Health Agency** data.

Click the double caret on the right to open the **Controls** menu. The **Controls** menu opens. See *Figure 7, ACC S&C Controls Menu*.



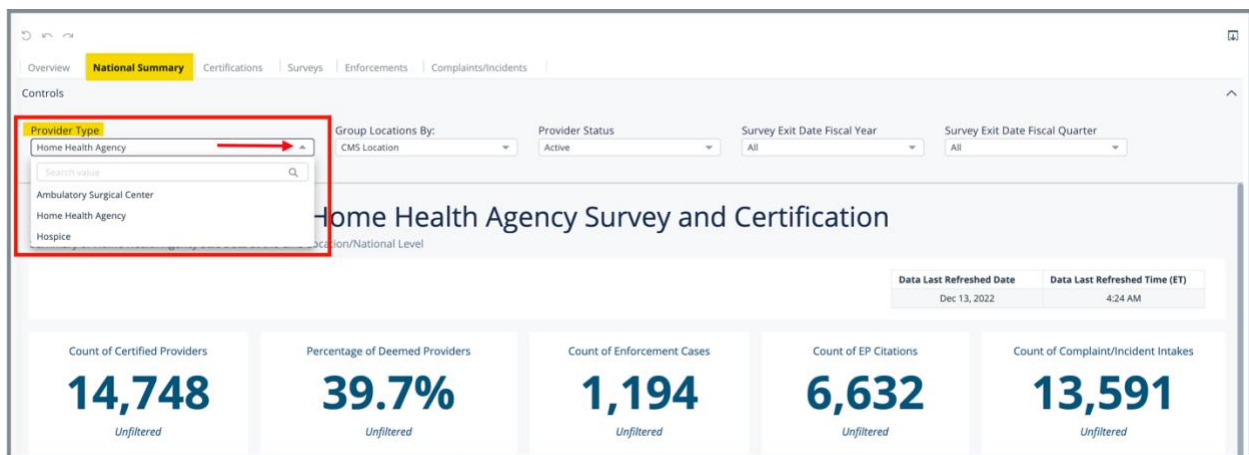
*Figure 7: ACC S&C Controls Menu*

Data can be filtered by CMS Location, state, provider, and many other dimensions related to the survey and certification process. Click the caret to access the drop-down menus and fill out any information desired. The data updates in real time.

## 2.4 National Summary Tab

**Overview:** The **National Summary** can show the national summary for either the Ambulatory Surgical Centers, Home Health Agencies, or Hospice provider types. Depending on what is selected, the national summary will show that data.

Select **Ambulatory Surgical Center**, **Home Health Agency**, or **Hospice** provider types from the drop-down menu under **Provider Type**. See *Figure 8, Provider Type Drop-Down Menu*.



**Figure 8: Provider Type Drop-Down Menu**

## 2.5 ACC S&C Tabs

**Overview:** All the tabs for ACC S&C Dashboard.

The ACC S&C Dashboard has the following tabs. See *Figure 9, ACC S&C Tabs*:

<b>Overview</b>	An overview of the dashboard
<b>National Summary</b>	See details in step 2.4, <a href="#">National Summary Tab</a>
<b>Certification</b>	Initial certifications and recertifications for deemed and nondeemed providers
<b>Surveys</b>	Survey activity and citations by survey type
<b>Enforcement</b>	Enforcement cases by remedy type and status
<b>Complaints/Incidents</b>	Intake trends over time and status



*Figure 9: ACC S&C Tabs*