



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Survey and Certification (S&C) Letter Template Management User Manual

**Version 2.1
July 14, 2025**

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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*.

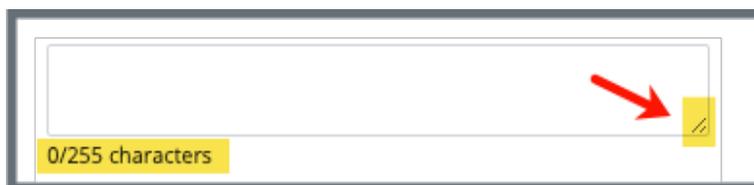


Figure 1: Expandable Field

- iQIES times out after 30 minutes of nonuse and reverts to the login page.
 - iQIES remains up and active as long as it is in use.
 - iQIES gives a five-minute warning before timing out.
 - The session resumes at the last accessed page after reauthentication.
 - Be sure to save data regularly. Pages that require saving are noted in this document, and have a **Save** button on the page.
- 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 2, 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 3, Tool Tip Icon*.

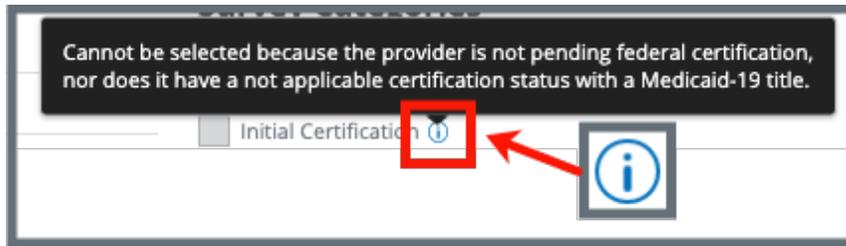


Figure 3: Tool Tip Icon

- 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 4, 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 5, Letter Template Management Drop-Down*. The **Template Library** page opens.

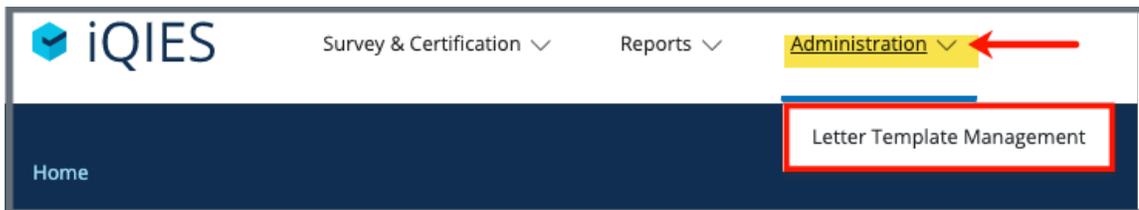


Figure 5: Letter Template Management Drop-Down

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 6, Search for a Template.*

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

The screenshot shows the 'Template Library' interface. At the top right is a 'Create New Template' button. Below it is a search bar labeled 'Search for Templates' with a red box around it. Below the search bar is a 'Show Advanced Search' link. Below that are 'Search' and 'Reset' buttons, with a red arrow pointing to the 'Search' button. Below the buttons, it says '1 - 20 of 143 Provider Templates'. Below that is a table with the following data:

ID	Name	Status	Template Type	Provider Type	Marginal Type	Last Used Date	Actions
FAYU	A1 - Kay Florida - Provider Welcome	Draft	Provider	ICF/IID, RHC, Clinical Laboratory, CORF, FQHC, Hospital, NH, PRTF, ASC, CMHC, ESRD, HHA, OPO, Hospice, XRAY, OPT/SP	Content	N/A	Actions
ZLBB	A1 - Kite Florida - Letterhead First Page	Published	Provider	CORF, HHA, ASC, Clinical Laboratory, CMHC, PRTF, Hospital, XRAY, ESRD, ICF/IID, FQHC, NH, Hospice, OPO, OPT/SP, RHC	Header	N/A	Actions
W7OE	A1 - Kite Florida Letterhead Footer	Published	Provider	CMHC, CORF, ESRD, RHC, Clinical Laboratory, ASC, FQHC, HHA, PRTF, Hos-	Footer	N/A	Actions

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:
 - **ID**
 - **Name**
 - **Status** (Draft, Published, Archived)
 - **Template Type**
 - **Provider Type**
 - **Marginal Type** (content, header, footer)
 - **Last Used Date**
 - **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 7, 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.

The screenshot shows the 'Advanced Search' interface. At the top left, there is a yellow button labeled 'Hide Advanced Search'. Below this, the search criteria are organized into four columns: 'Provider Type', 'Status', 'Marginal Type', and 'Template Type'. Each column has a dropdown menu with 'Select...' and 'Select one or more' options. Below these columns is a 'Last Used Date' section with 'From' and 'To' date pickers. At the bottom, there are 'Search' and 'Reset' buttons. A red arrow points to the 'Search' button.

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 8, 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	<p>This template is either just a header or just a footer. It can be added to content templates to create other templates.</p> <p>Both the header and footer are created at the top of the page. They will appear correctly when added to a letter template.</p>
Template Type	Select from Provider, Survey, Intake, or Enforcement . Template Type cannot be edited after the template is saved.

Template Field	Description
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 9, Letter Template Parts Explanation*.

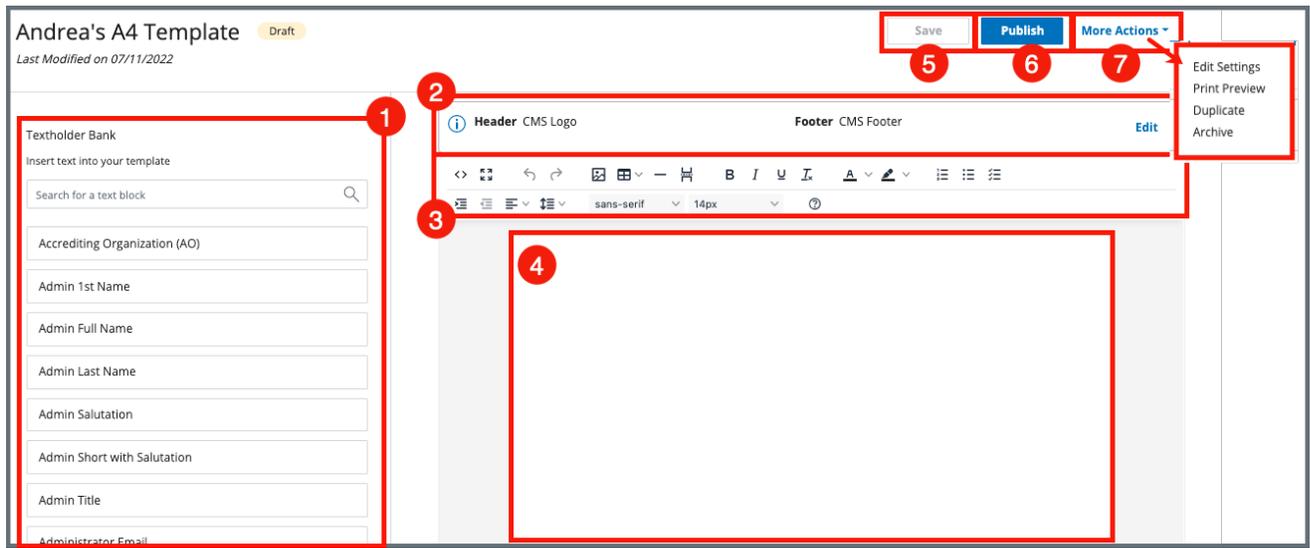


Figure 9: Letter Template Parts Explanation

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 10, Upload Image*.

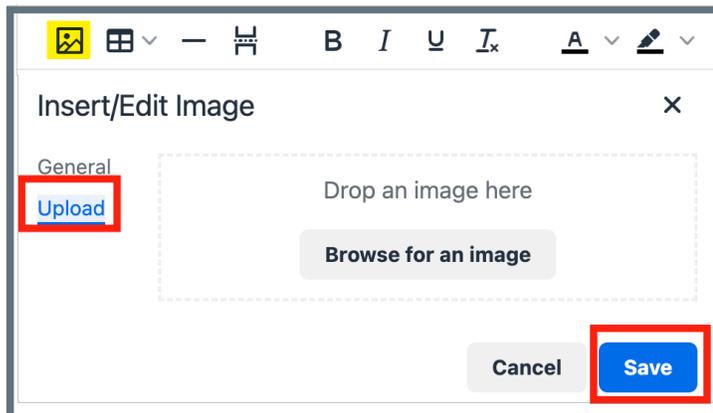


Figure 10: Upload Image

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 11, 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 12, Duplicate a Template*. The **Edit Settings** window pops up.

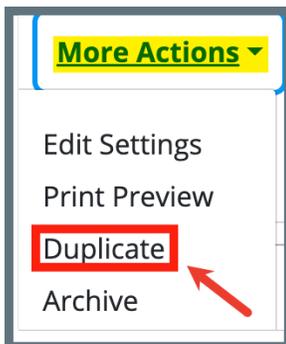


Figure 12: Duplicate a Template

- 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 13, Archive a Template*. The **Are you sure?** window pops up.

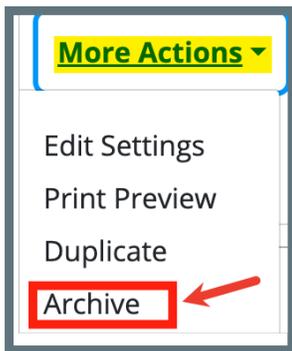


Figure 13: Archive a Template

8.2 Click **Yes, archive**. See *Figure 14, Are you sure? Pop-up Window*. The **Letter Template Archived Notification** opens. See *Figure 15, Letter Template Archived Notification*.

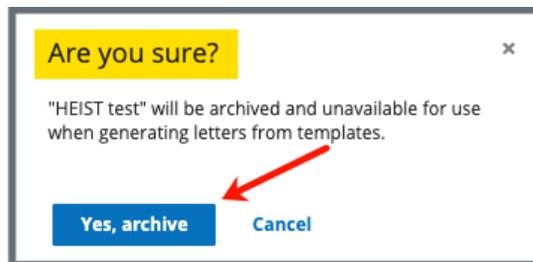


Figure 14: Are you sure? Pop-up Window

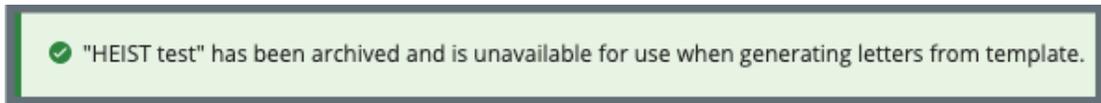


Figure 15: Letter Template Archived Notification

- 8.3 Reinstatement 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 16, Select a Template*.

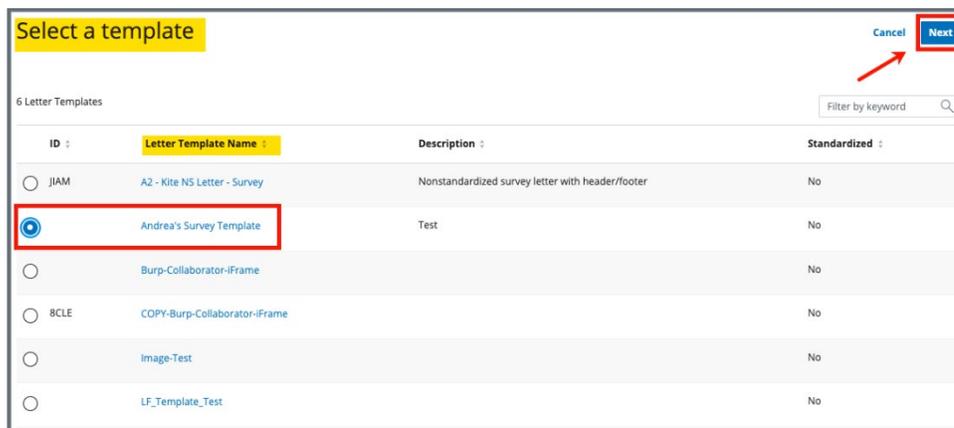


Figure 16: Select a Template

9.9 Click **Next**. The **Create attachment** page opens.

Note: **Next** is disabled until a selection is made.

9.10 Update the template as desired. See *Figure 17, Letter Template*.

Notes:

- Only nonstandardized templates can be modified. 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 (providers, surveys, intakes, enforcements). To modify a standardized template, the template owner must edit the template in Letter Template Management.

Create attachment
Edit and preview letter.

Andrea's Survey Template

Print Preview (a)

File Name * (b) Andrea's Survey Templat

Description (c)

Rich text editor toolbar (d): Rubik, 14px

Preview area (e):

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

June 30, 2025

House of the Rising Sun54
1 Main St
Anytown, FL 87960

Dear Dr. Frank N. Stein,

We are sorry to inform you that the above-noted provider did not meet the requirements for Medicaid care because of the following:

We will revisit this facility 15 days from today's date.

Sincerely,

Dr. Henry Jekyll
Medical Director

Create attachment (f)

Figure 17: Letter Template

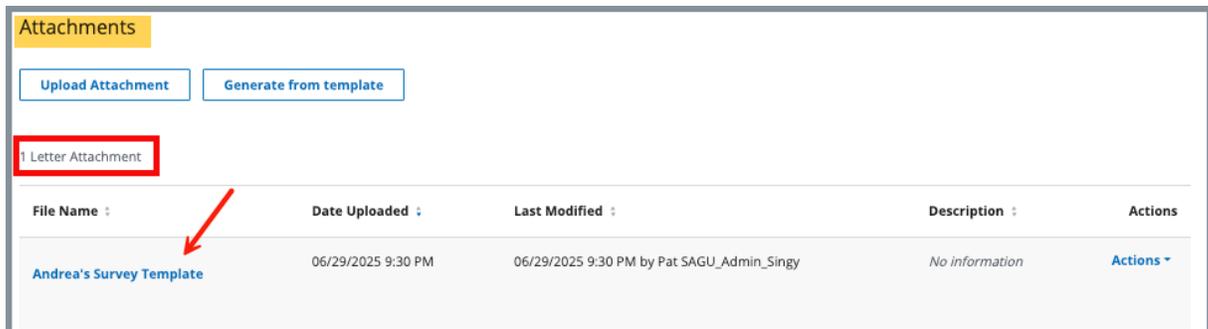
1. **Print Preview:** Click **Print Preview** to preview the .pdf version of the letter. The letter can be downloaded from **Print Preview**, if desired.
2. **File Name:** Edit the name, if desired.
3. **Description:** Enter keywords, if desired. Keywords are descriptive words that help the user find the content. For example, the template title might be “Unsubstantiated Claim,” and the key words could be federal, minor. Separate the keywords with a comma.

4. **Formatting:** The format menu allows content to be edited, including formatting, bulleting, etc. See [Appendix B, Tips and Tricks for Working in a Template](#), for up-to-date details on each icon in the menu.
5. **Letter:** Shows how the letter looks. Verify inputs. Make any changes for nonstandardized templates, if desired.
6. **Create attachment:** Click **Create attachment** to create a .pdf that attaches to provider/survey/intake/enforcement record.

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

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

Note: Click the file name to automatically download the letter to the user's computer.



File Name	Date Uploaded	Last Modified	Description	Actions
Andrea's Survey Template	06/29/2025 9:30 PM	06/29/2025 9:30 PM by Pat SAGU_Admin_Singy	No information	Actions

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.

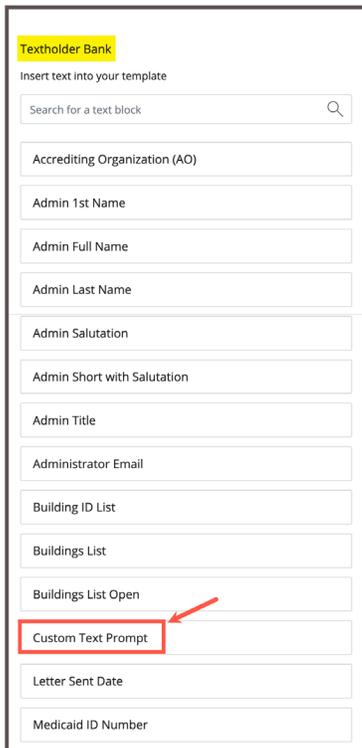
Note:

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

10.3 Click **Custom Text Prompt** from **Textholder Bank**. See *Figure 19, 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.



The screenshot shows a web interface titled "Textholder Bank" with a search bar and a list of text blocks. The blocks are: Accrediting Organization (AO), Admin 1st Name, Admin Full Name, Admin Last Name, Admin Salutation, Admin Short with Salutation, Admin Title, Administrator Email, Building ID List, Buildings List, Buildings List Open, Custom Text Prompt (highlighted with a red box and a red arrow), Letter Sent Date, and Medicaid ID Number.

Figure 19: Custom Text Prompt Location

10.4 Edit the **User entered prompt** in the **Custom Text Prompt** formula with desired data. See *Figure 20, 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.

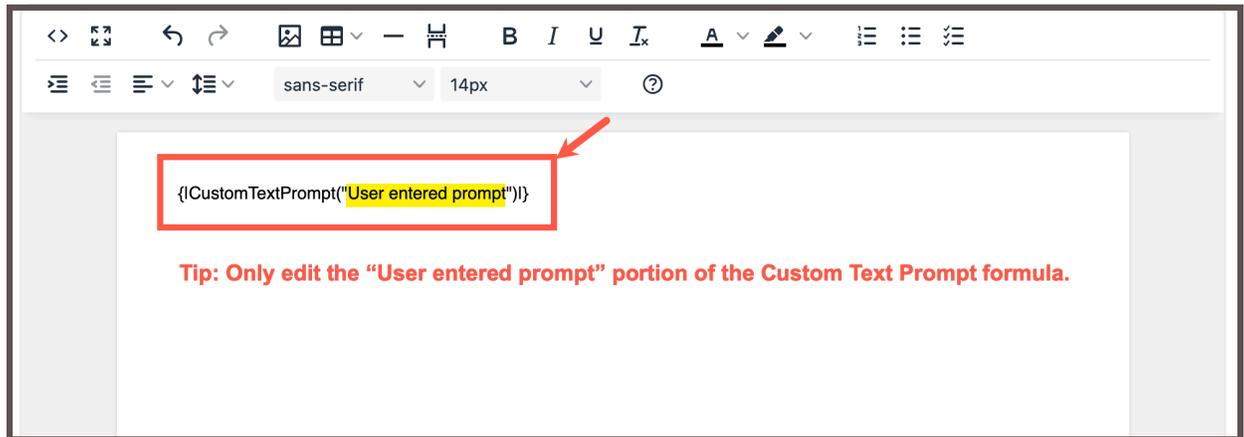
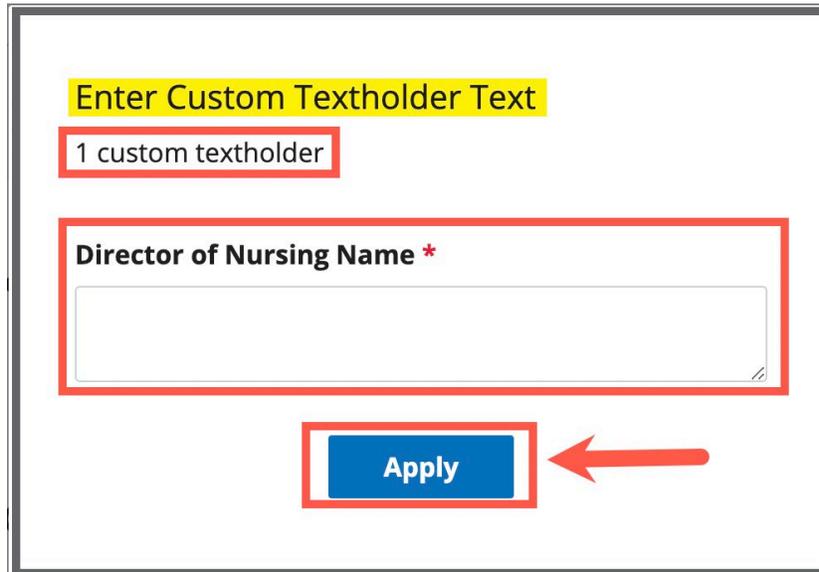


Figure 20: Edit Custom Text Prompt

- 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 21, 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.



Enter Custom Textholder Text

1 custom textholder

Director of Nursing Name *

Apply

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. See *Figure 22, Template Menu*. Here are a few tips and tricks to help:

Template Menu

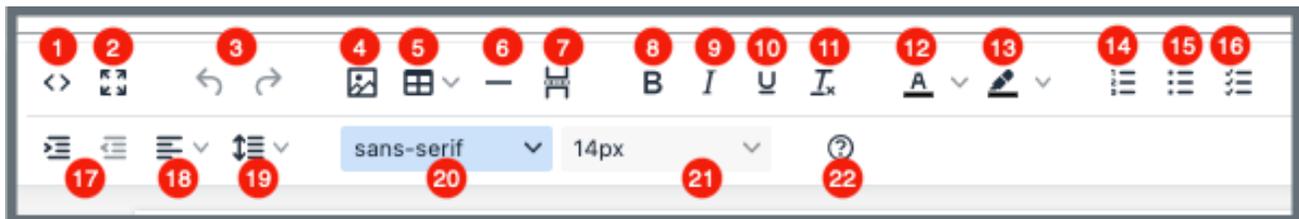


Figure 22: Template Menu

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 1 st 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 1 st 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 1 st 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 Mailing Address
Admin 1 st Name	Federal CMP(s)	Provider State
Admin Full Name	Latest Denial of Payment Remedy	Provider State ID (FACID)
Admin Last Name	Letter Sent Date	Provider State License Number
Admin Salutation	Medicaid ID Number	Provider Telephone
Admin Short with Salutation	NATCEP/Nurse Aide Training Ban Last Loss Date	Provider Type Abbrev
Admin Title	NATCEP/Nurse Aide Training Ban Loss Date	Provider Type Full Description
Administrator Email	Next Licensure Letter Remedies	Provider Zip
All CMPs	Per Day CMP(s)	Recommended Federal CMP(s)
Building ID List	Per Instance CMP(s)	Remedies with State Recommended Effective Date
Buildings List	Primary Case Worker Email Address - Fed	Remedy List
Buildings List Open	Primary Case Worker Name - Fed	Remedy List – All Federal

Enforcement Textholders		
Changes from IDR	Primary Case Worker Phone Number - Fed	Remedy List – In Effect
Changes from IDR (No Status)	Primary NATCEP Trigger	Remedy List – Not in Effect
CMP Collection Number	Provider Address 1 (Street)	Remedy List – Pending
CMP First CMS Notice Date	Provider Address 2	Remedy List – Recommended
Custom Text Prompt	Provider CCN	Substantial Compliance Date
Cycle Start + 3 Months	Provider City	Survey High Citations
Cycle Start + 6 Months	Provider Doing Business As Name	Title (Mapped from Provider Certification & Licensure tab)
Date # Days after Sent Date (Numbers)	Provider Fax Number	Today’s Date
Date # Days after Sent Date (Words)	Provider Full Address	Today’s Date Full
Date Facility out of Compliance	Provider Legal Name	