



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

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

**Version 3.1
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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, review [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. Review 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*.

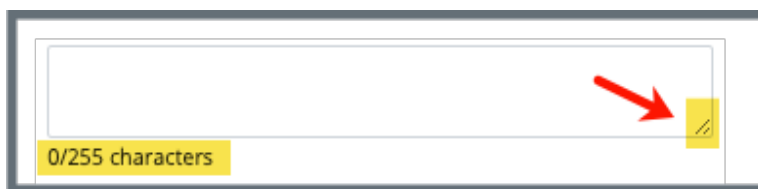


Figure 1: Expandable Field

- 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.

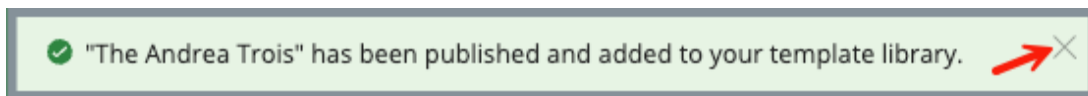


Figure 2: Notification Banner

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 that 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*.

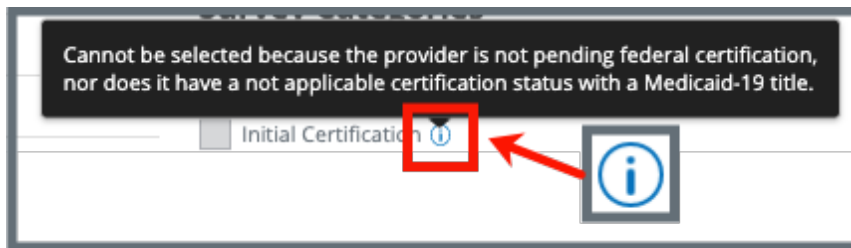


Figure 3: Tool Tip Icon

- 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. Review the [iQIES User Roles Matrix](#) for detailed information on roles.

For additional help, go 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. Review [Letters, Notes, Attachments User Manual](#) for details on how to upload letters or generate letters from a template.
- Templates cannot be shared across types (provider, survey, intake, enforcement).
- Textholders can be shared across types.
- Batch letters are not currently supported.
- Review 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 caret and select **Letter Template Management** from the drop-down menu. See *Figure 5, Letter Template Management Drop-Down*. The **Template Library** page opens.

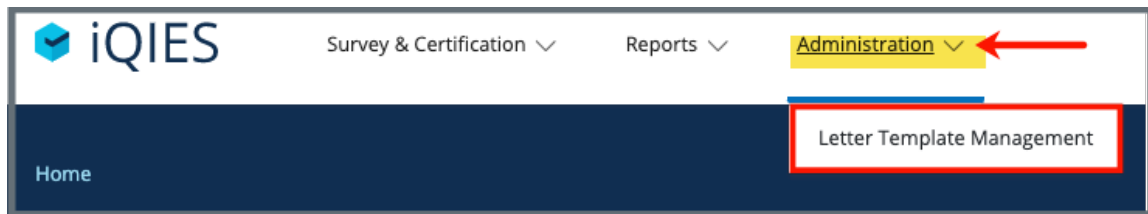


Figure 5: Letter Template Management Drop-Down

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.

Template Library [Create New Template](#)

Search for Templates

Enter template name or any keyword

> [Show Advanced Search](#)

[Search](#) [Reset](#)

1 - 20 of 143 Provider Templates

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, OP O, 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. See [Advanced Search](#) steps 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 it, a red rectangular box highlights the search criteria section. This section contains five fields: 'Provider Type' (with a dropdown menu), 'Status' (with a dropdown menu), 'Marginal Type' (with a dropdown menu), 'Template Type' (with a dropdown menu), and 'Last Used Date' (with 'From' and 'To' date pickers). Below the red box, there are two buttons: a blue 'Search' button and a light blue 'Reset' button. 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, a header, or a footer.

Note: Review [Create a Template Across Template Types](#) to create a template that supports textholders from multiple functional areas.

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.

- 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*.

The screenshot shows a 'Create a new template' pop-up window. The title bar is yellow and says 'Create a new template' with a close button. The form contains the following fields:

- ID**: Text box containing 'DGGC'.
- Template Name ***: Text box.
- Standardized Template**: Checkbox.
- Description**: Text area.
- Marginal Type ***: Radio buttons for 'Content', 'Header', and 'Footer'.
- Provider Type ***: Dropdown menu with 'All X Select...'.
- State**: Dropdown menu with 'Florida'.
- Management Unit**: Dropdown menu with 'Select one'.
- Work Unit**: Dropdown menu with 'Select one'.

At the bottom are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

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 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

Template Field	Description
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* and *Table 2, Letter Template Detailed Callout*.

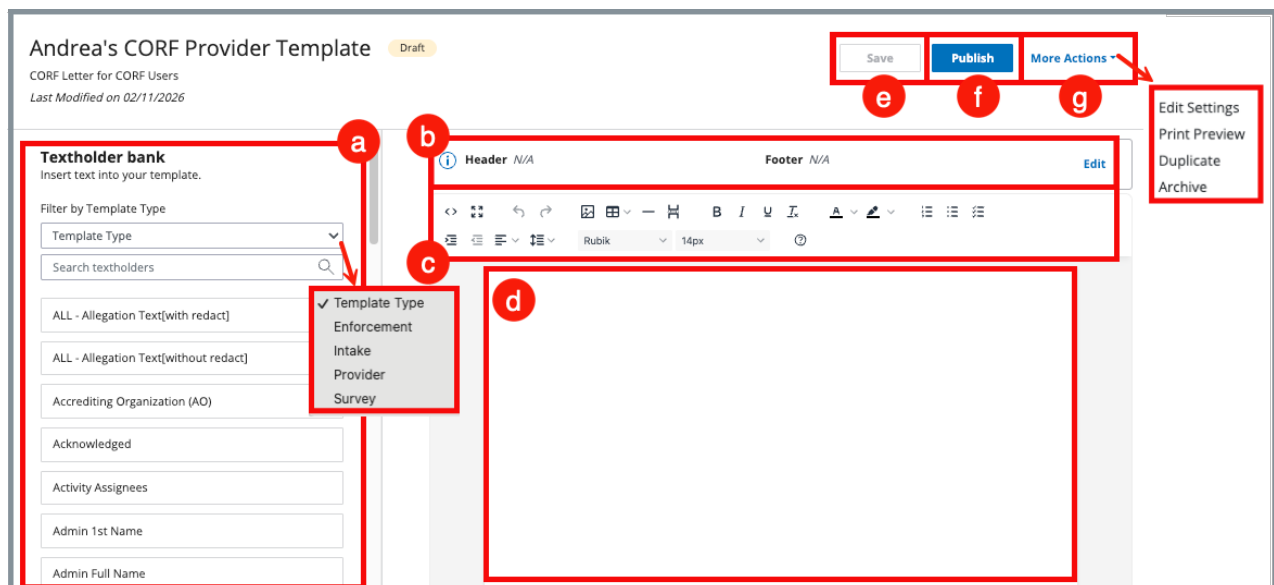


Figure 9: Letter Template Parts

Table 3: Letter Template Detailed Callout

No.	Section Detail	Description										
a	Textholder Bank	Lists all available textholders that can be added to the letter template. Select a Template Type from the drop-down menu to narrow down the selection. Leave blank to access all textholders. Textholders apply to all areas and appear in alphabetical order. Type the first few letters of desired text in the Search box to search for a specific textholder. Appendices B-F list textholders by area.										
b	Header/Footer/Edit	Displays headers and footers when used. Select Edit to modify the template header, footer, ID, name, or description. The Edit Settings window opens for updates.										
c	Editor	Enables content editing, including formatting and bullet styles. Appendix A lists tips and tricks for working in a template.										
d	Letter Template	Displays the letter template being created. Add textholders to populate data.										
e	Save	Saves the template as a draft.										
f	Publish	Publishes the template to the template library for use.										
g	More Actions	<table><tr><td>Edit Settings</td><td>Updates template settings</td></tr><tr><td>Print Preview</td><td>Displays print preview</td></tr><tr><td>Duplicate</td><td>Creates a copy of the template</td></tr><tr><td>Archive</td><td>Removes template from circulation. The template cannot be used, but it can be reinstated. See Archive a Template, for further information.</td></tr><tr><td>Return as Draft</td><td>Allows editing of an active or archived template. The template is not available for use until it is republished.</td></tr></table>	Edit Settings	Updates template settings	Print Preview	Displays print preview	Duplicate	Creates a copy of 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	Allows editing of an active or archived template. The template is not available for use until it is republished.
Edit Settings	Updates template settings											
Print Preview	Displays print preview											
Duplicate	Creates a copy of 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	Allows editing of an active or archived template. The template is not available for use until it is republished.											

- 5.4 Click the image icon in the editor to add a logo, if desired. The **Insert/Edit Image** pop-up window opens. See *Figure 10, Upload an Image*.

Note: Hover over any icon in the editor to view tool descriptions or review [Appendix A](#) for tips and tricks for working in a template.

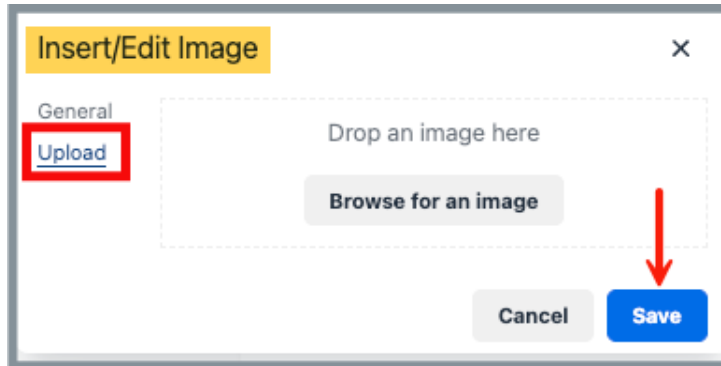


Figure 10: Upload an Image

- 5.5 Click **Upload**.

Notes:

- The default landing is the **General** tab.
- 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.

- 5.6 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.

- 5.7 Click **Save**.

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

- 5.9 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](#).

5.10 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.
- Custom textholders can be created with the **Custom Text Prompt** from the Textholder Bank. Review [Custom Text Prompts](#) for more information.

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

5.12 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.

6. Create a Template Across Template Types

Purpose: To create a template that supports textholders from multiple functional areas. For example, a survey is linked to intakes and textholders are needed for both areas.

Notes:

- Textholders can be used from multiple functional areas in the same letter.
- Review screenshots in [Create a New Template](#), if needed.

6.1 Click **Create New Template** on top right of window. The **Create a new template** pop-up window opens.

6.2 Fill in the fields. See [New Template Field Descriptions](#) for details of the fields.

6.3 Click **Save**. The newly-created letter template opens. See [Letter Template Detailed Callout](#) for details of the fields.

6.4 Click the image icon in the editor to add a logo, if desired. The **Insert/Edit Image** pop-up window opens.

Note: Hover over any icon in the editor to view tool descriptions or review [Appendix A](#) for tips and tricks for working in a template.

6.5 Click **Upload**.

Notes:

- The default landing is the **General** tab.
- 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.

6.6 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.

6.7 Click **Save**.

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

- 6.9 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](#).

- 6.10 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.
- Select textholder by template type or by leaving the template type blank. Insert in document. See *Figure 11, Template with Different Template Types*.
- Custom textholders can be created with the **Custom Text Prompt** from the Textholder Bank. Review [Custom Text Prompts](#) for more information.

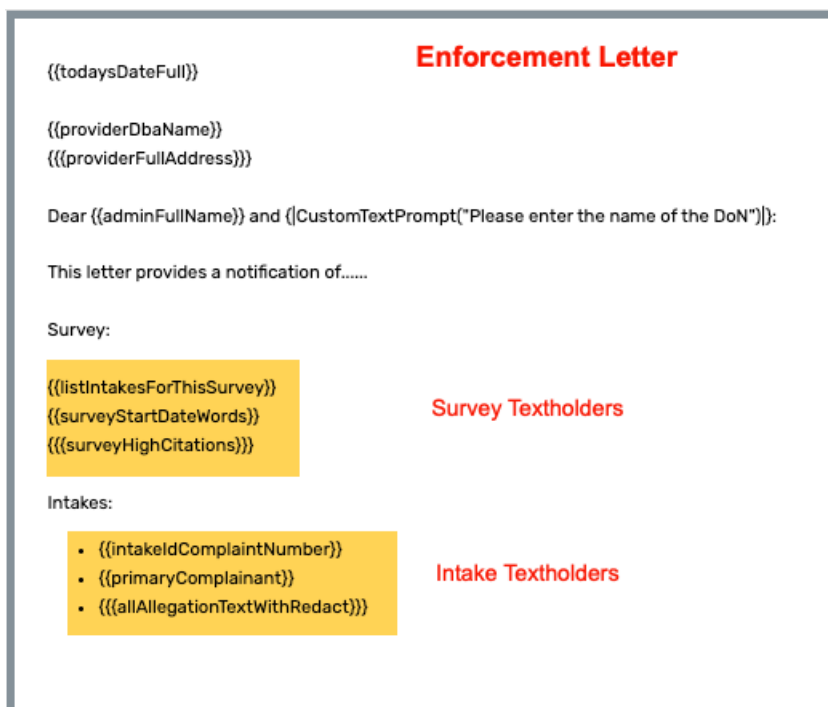


Figure 11: Template with Different Template Types

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

6.12 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 [Letters, Notes, Attachments User Manual](#) for more information on how to generate a letter with a template, if necessary.

7. Edit a Template

Purpose: To edit an existing template.

Notes:

- To make updates in a nonstandardized template, review [Letters, Notes, Attachments User Manual](#).
 - **Marginal Type, Template Type, and Provider Type** cannot be edited after the template is saved.
- 7.1 Click the desired template under **Name** from the **Template Library**. The template opens and can be edited.
 - 7.2 Click **Edit** to edit template ID, name, description, header, or footer. See *Figure 12, Edit a Template*. The **Edit Settings** pop-up window opens.

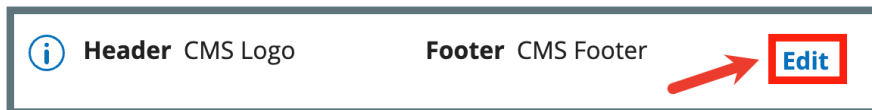


Figure 12: Edit a Template

Note: Select **Edit Settings** from the **More Actions** drop-down menu to open the **Edit Settings** window. The only settings that can be updated are:

- **ID**
- **Template name**
- **Standardized Template** (switch between standardized and nonstandardized templates)
- **Description**
- **Header**
- **Footer**

The **Marginal, Template, and Provider Types** cannot be changed. Click **Save** to save changes.

- 7.3 Update the template as desired.
- 7.4 Click **Save** to save as a draft or click **Publish** to publish template.

8. Duplicate a Template

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

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

- 8.1 Select **Duplicate** from the **More Actions** drop-down menu. See *Figure 13, Duplicate a Template*. The **Edit Settings** pop-up window opens.

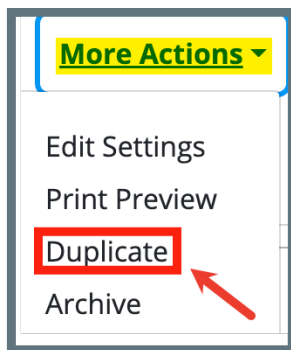


Figure 13: Duplicate a Template

Note: Templates can also be duplicated directly from the **Template Library**. Select **Duplicate** from the **Actions** drop-down menu next to the template.

- 8.2 Rename the template.
- 8.3 Update the fields as needed.
- 8.4 Click **Save**. The **Letter Template Management** page opens and the letter can be edited.
- 8.5 Click **Save** to save the template as a draft or click **Publish** to publish the template.

9. 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 a Letters Administrator role or a CMS User role can archive a template. Double check any template before archiving.

9.1 Select **Archive** from the **More Actions** drop-down menu. See *Figure 14, Archive a Template*. The **Are you sure?** pop-up window opens.

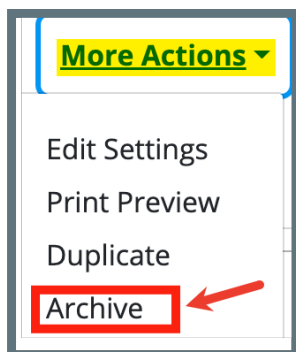


Figure 14: Archive a Template

Note: Templates can also be archived directly from the **Template Library**. Select **Archive** from the **Actions** drop-down menu next to the template.

9.2 Click **Yes, archive**. See *Figure 15, Are you sure? Pop-Up Window*. The **Letter Template Archived Notification** opens. See *Figure 16, Letter Template Archived Notification*.

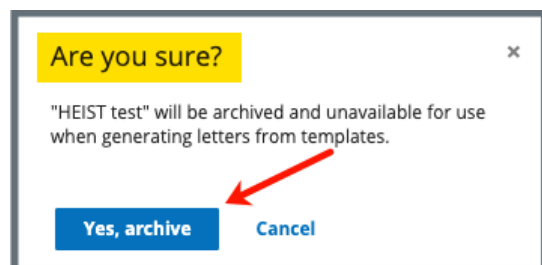


Figure 15: Are you sure? Pop-Up Window

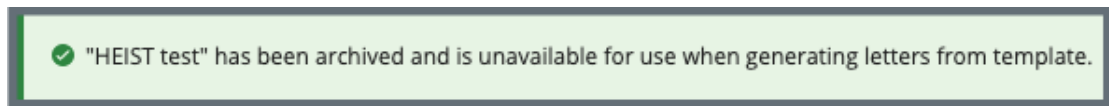


Figure 16: Letter Template Archived Notification

10. Reinstate an Archived Template

Purpose: To reinstate an archived template to an active template.

- 10.1 Go to the **Template Library**.
- 10.2 Click **Show Advanced Search**.
- 10.3 Click **Archived** under **Status**. See *Figure 17, Select Status to Update an Archived Template*.

The screenshot shows the 'Template Library' search interface. At the top, there is a search bar with the text 'andrea' and a placeholder 'Enter template name or any keyword'. Below the search bar is a link 'Hide Advanced Search'. The interface is divided into two main sections: 'PROVIDER TYPE' and 'LAST USED DATE'. The 'PROVIDER TYPE' section has a dropdown menu labeled 'Provider Type' with 'All' selected. The 'LAST USED DATE' section has two date pickers labeled 'From' and 'To'. On the right side, there is a 'STATUS' dropdown menu. The 'STATUS' dropdown is highlighted with a red box, and the 'Archived' option is selected, indicated by a red arrow. At the bottom left, there is a blue 'Search' button and a 'Reset' link. A red arrow points to the 'Search' button.

Figure 17: Select Status to Reinstate an Archived Template

- 10.4 Click **Search**.
- 10.5 Open the template to be reinstated.

10.6 Select **Publish** or **Return as draft** from the drop-down menu under **More Actions**. See *Figure 18, Reinstate an Archived Template*.

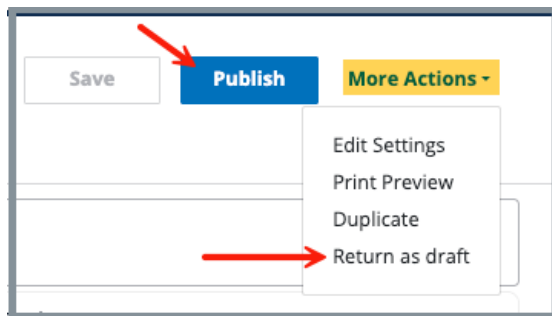


Figure 18: Reinstate an Archived Template

11. Create a Custom Text Prompt

Purpose: To create a custom textholder to a standardized letter that is not available in record data. This prompt pops up when the template is attached to its corresponding record and the desired data can then be added.

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

11.2 Select area in template where desired custom textholder will be inserted.

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

11.3 Click **Custom Text Prompt** from **Textholder Bank**.

11.4 Edit the **User entered prompt** in the **Custom Text Prompt** formula with desired data.

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. See *Figure 19, Edit Custom Text Prompt*.

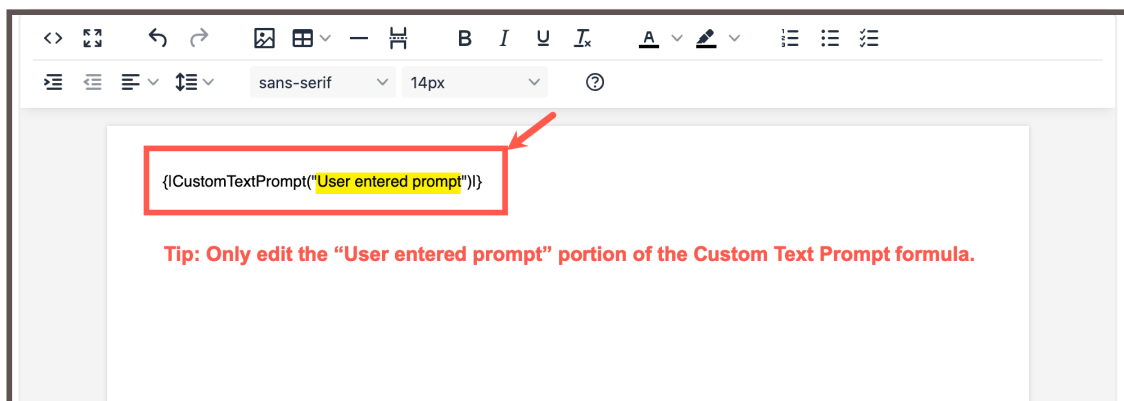


Figure 19: Edit Custom Text Prompt

11.5 Click **Save** to save template.

Note: The [Letters, Notes, Attachments User Manual](#) includes instructions for using the **Custom Text Prompt** in the **Add Text to a Custom Textholder** step.

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 20, Template Menu*. Here are a few tips and tricks to help:

Template Menu

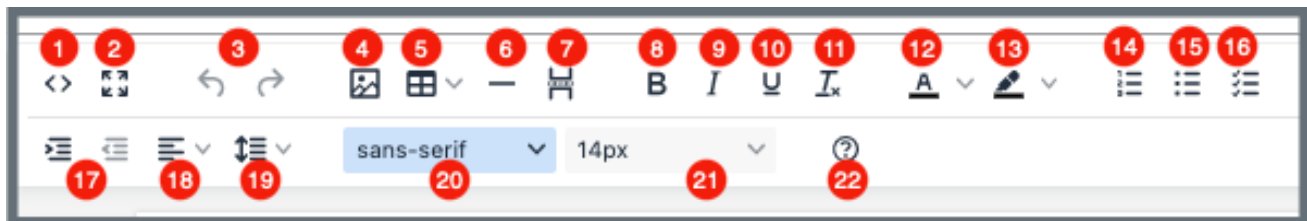


Figure 20: Template Menu

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

- | | |
|---|---|
| 1. Show HTML code | 12. Highlight text and click to change text color |
| 2. Put document in full screen (make it bigger) | 13. Highlight text and click to highlight text |
| 3. Undo/Redo | 14. Create a numbered list |
| 4. Insert an image. A small Drop image box opens. Drag and drop a file or click the box and search for the file. | 15. Create a bulleted list |
| 5. Insert a table | 16. Insert a checklist |
| 6. Insert a horizontal line | 17. Indent/Remove indent |
| 7. Insert a page break | 18. Alignment: Left, Center, Right, Justified |
| 8. Highlight text and click to make bold | 19. Adjust the line height |
| 9. Highlight text and click to <i>italicize</i> | 20. Select a font |
| 10. Highlight text and click to <u>underline</u> | 21. Select a font size |
| 11. Clear formatting | 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 that are available for use across areas. Textholders listed below are available for insertion but may not populate data for all records.

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	State Agency Name
Building ID List	Provider Fax Number	Title (Mapped from Provider Certification & Licensure tab)
Buildings List	Provider Full Address	Today's Date
Buildings List Open	Provider Legal Name	Today's Date Full
Custom Text Prompt	Provider Mailing Address	

Appendix C: Survey Textholder Text

Each provider, survey, intake, or enforcement area has area-appropriate textholders that are available for use across areas. 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 Agency Name
Buildings List Open	Medicaid ID Number	State Survey Categories
Custom Text Prompt	Observation Text (9999)	Survey All Tags IDR Status
Date # Days after Exit Date (Numbers)	POC Due Date	Survey Extent(s)
Date # Days after Exit Date (Words)	POC Due Date in Words	Survey High Citations
Date # Days after Start Date (Numbers)	Provider Address 1 (Street)	Survey Purpose

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

Appendix D: Intake Textholder Text

Each provider, survey, intake, or enforcement area has area-appropriate textholders that are available for use across areas. Textholders listed below are available for insertion but may not populate data for all records.

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

Intake Textholders		
Allegation Category	Intake Recipient	Revisit-List New Tags
Alleged Event Date	Investigation Due Date	Revisit-List Repeat Tags
Building ID List	Investigation Due Date Long	State Agency Name
Buildings List	Investigators	Start Date (Numbers)
Buildings List Open	Letter Sent Date	Start Date (Words)
Complainant Address	List Intakes For This Survey	State Intake ID
Complainant Names	List Level A Cites (Disabled for HHA)	State Survey Categories
Complainant Relationship (Primary)	List Survey Team	Survey All Tags IDR Status
Custom Text Prompt	List Tag Numbers Only	Survey Extent(s)
Date # Days after Exit Date (Numbers)	List Tag/Surveyor Test	Survey High Citations
Date # Days after Exit Date (Words)	List Tags Cited	Survey Purpose
Date # Days after Intake Date (Numbers)	Medicaid ID Number	Survey Regulation Type
Date # Days after Intake Date (Words)	Observation Text (9999)	Survey Revisits
Date # Days after Start Date (Numbers)	POC Due Date	Survey Revisits – Dates Only
Date # Days after Start Date (Words)	POC Due Date in Words	Survey Team Leader
Date # Days in Future (Numbers)	Primary Complainant	Survey Type

Intake Textholders		
Date # Days in Future (Words)	Provider Address 1 (Street)	Termination – 23 Days
Date # Working Days	Provider Address 2	Termination – 90 Days
Date CMS-2567 Issued	Provider CCN	Third Visit Date
Date Follow-up Investigation	Provider City	Title (Mapped from Provider Certification & Licensure tab)
Date IDR Request Received	Provider Doing Business As Name	Today's Date
Date Received/Intake Start Date	Provider Fax Number	Today's Date Full

Appendix E: Enforcement Textholder Text

Each provider, survey, intake, or enforcement area has area-appropriate textholders that are available for use across areas. Textholders listed below are available for insertion but may not populate data for all records.

Enforcement Textholders are listed below.

Enforcement Textholders		
Accrediting Organization (AO)	Deny Pay for New Admits 04B - 3 mo Last Date	Provider Full Address
Admin 1 st Name	Discretionary Deny Pay for New Admits 04A Effective Date	Provider Legal Name
Admin Full Name	Discretionary Deny Pay for New Admits 04A Last Date	Provider Mailing Address
Admin Last Name	Federal CMP Amount Due	Provider State
Admin Salutation	Federal CMP(s)	Provider State ID (FACID)
Admin Short with Salutation	Latest Denial of Payment Remedy	Provider State License Number
Admin Title	Letter Sent Date	Provider Telephone
Administrator Email	Medicaid ID Number	Provider Type Abbrev
All CMPs	NATCEP/Nurse Aide Training Ban Last Loss Date	Provider Type Full Description
Building ID List	NATCEP/Nurse Aide Training Ban Loss Date	Provider Zip
Buildings List	Next Licensure Letter Remedies	Recommended Federal CMP(s)

Enforcement Textholders		
Buildings List Open	Per Day CMP(s)	Remedies with State Recommended Effective Date
Changes from IDR	Per Instance CMP(s)	Remedy List
Changes from IDR (No Status)	Primary Case Worker Email Address - Fed	Remedy List – All Federal
CMP Collection Number	Primary Case Worker Name - Fed	Remedy List – In Effect
CMP First CMS Notice Date	Primary Case Worker Phone Number - Fed	Remedy List – Not in Effect
Custom Text Prompt	Primary NATCEP Trigger	Remedy List – Pending
Cycle Start + 3 Months	Provider Address 1 (Street)	Remedy List – Recommended
Cycle Start + 6 Months	Provider Address 2	State Agency Name
Date # Days after Sent Date (Numbers)	Provider CCN	Substantial Compliance Date
Date # Days after Sent Date (Words)	Provider City	Survey High Citations
Date Facility out of Compliance	Provider Doing Business As Name	Title (Mapped from Provider Certification & Licensure tab)
Deny Pay for New Admits 04B - 3 mo Effective Date	Provider Fax Number	Today's Date
		Today's Date Full

Appendix F: CLIA Textholder Text

CLIA has area-appropriate textholders that are available for use. Textholders listed below are available for insertion but may not populate data for all records.

Note: CLIA Textholders are found within provider, survey, intake, and enforcement textholder banks and are available only for the CLIA provider type.

CLIA Textholders are listed below.

CLIA Textholders		
CLIA 1st AOC Request Date	CLIA Address	CLIA Lab Name
CLIA 1st AOC Review Date	CLIA City	CLIA Owner Name
CLIA 1st AOC Submission Date	CLIA Number	CLIA Phone Number
CLIA 1st POC Request Date	CLIA Complaint Number	CLIA Proposed Letter Sent
CLIA 1st POC Review Date	CLIA Condition	CLIA Staff email
CLIA 1st POC Submission Date	CLIA Credentials	CLIA Staff Name
CLIA 2nd AOC Request Date	CLIA Date	CLIA State
CLIA 2nd AOC Review Date	CLIA Date of survey	State Agency Name
CLIA 2nd AOC Submission Date	CLIA Director Name	CLIA Survey Type
CLIA 2nd POC Request Date	CLIA Email Address	CLIA Surveyor Name
CLIA 2nd POC Review Date	CLIA Final Sanction Notice	CLIA Title
CLIA 2nd POC Submission Date	CLIA Follow-up Survey Date	CLIA Zip
CLIA Additional Contacts	CLIA Imposed Letter Sent	