Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Survey and Certification (S&C) Letters, Notes, Attachments User Manual

Version 1.1

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1. Introduction

This user manual addresses how to add and edit notes, letters, and attachments. This manual is for all other provider areas and most user role permissions. Be aware that **Letter Template Management** is a separate manual and can be found 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 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*.

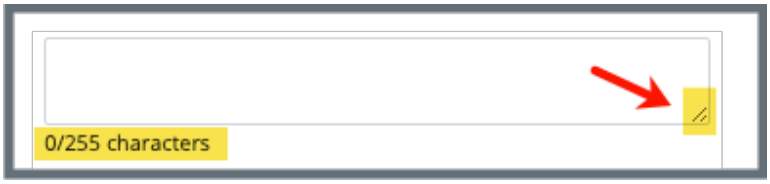

Figure 1: Expandable Field

- 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 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.

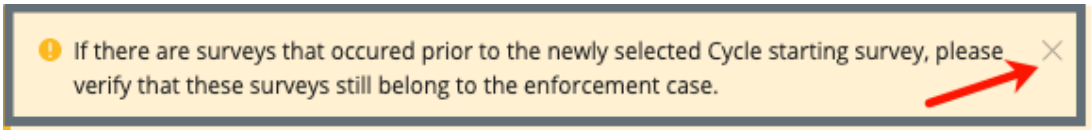

Figure 2: Notification Banner

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 SO for your organization
Technical Support:	Contact the iQIES Service Center: **Phone**: 888-477-7876 (select Option 1) **Email**: iQIES@cms.hhs.gov
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: • 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 the information is accessible to most user roles.

Permissions are ultimately governed by HARP access privileges. Contact the Security Official (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. Letters, Notes, and Attachments Overview

This user manual addresses how to prepare, add, review, manage, and edit letters, notes, and attachments. Letters, notes, and attachments are consistent for each area: Provider, Survey, Intake, Enforcement, electronic Plan of Correction (ePOC). Any differences, if available, are noted within each section.

3. Letters

Purpose: To add, upload, generate a letter from an existing template, edit a Letter Overview, delete a letter, or add recipients to a letter. Nonstandardized templates can be edited in the Letters section of the applicable S&C area (providers, surveys, intakes, enforcements).

Notes:

- Letter templates are created in the Letter Template Management section and require a Letters Administration user role. Review S&C User Manual: Letter Template Management for more information.
- The Provider ePOC Administrator role can only view letters. It cannot upload letters.

3.1 Add/Upload a Letter

3.1.1 Click **Letters** on the left menu to go to **Letters**. See *Figure 5, Letters*.

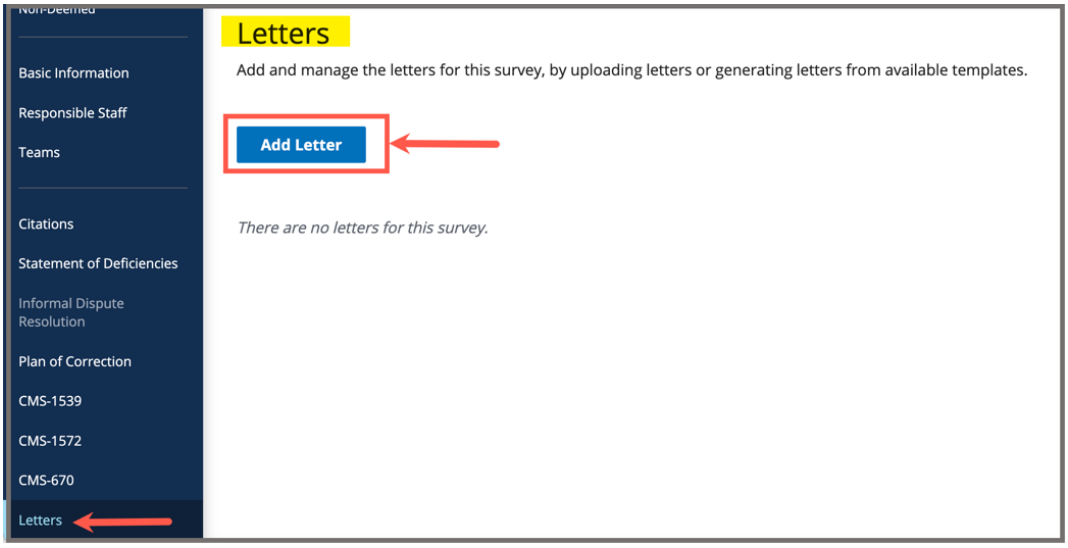

Figure 5: Letters

3.1.2 Click **Add Letter**. The **Letter Overview** window opens. See *Figure 6, Letter Overview*.

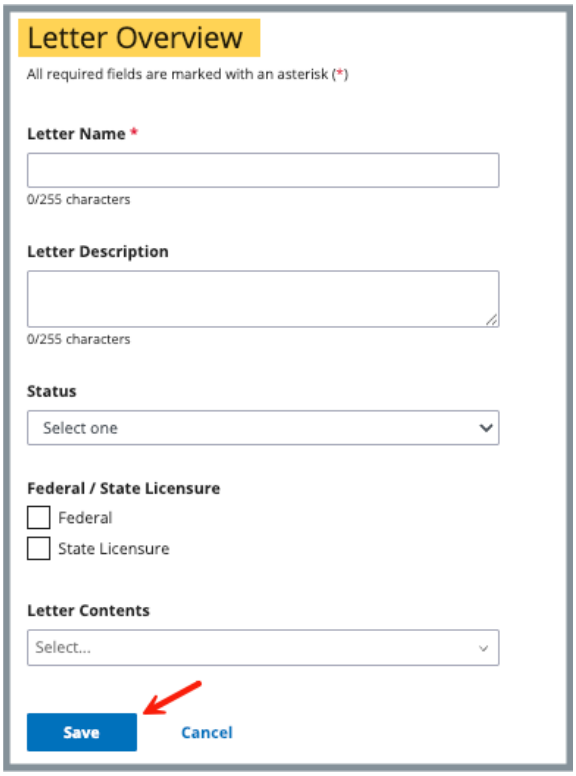

Figure 6: Letter Overview

3.1.3 Fill out the information.

3.1.4 Click **Save**. The information updates in a new screen. See *Figure 7, Letter Attachment and Recipient*.

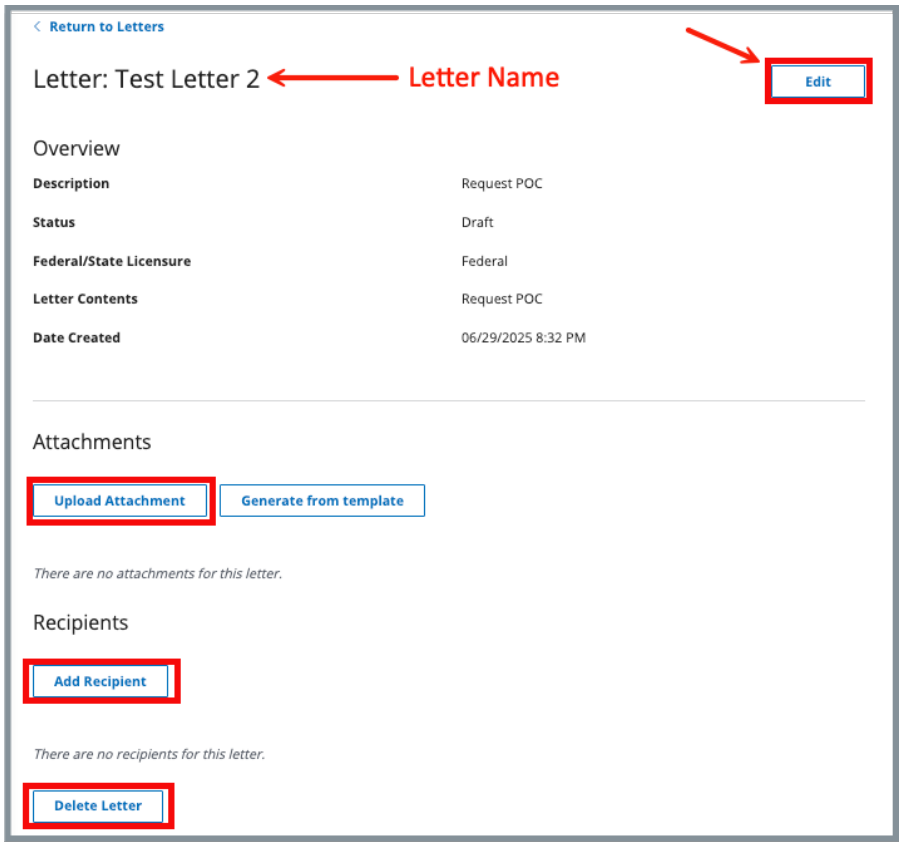

Figure 7: Letter Attachment and Recipient

3.1.5 Scroll down to **Attachments**.

3.1.6 Click **Upload Attachment** to upload a letter from the computer.

3.1.7 Click **Select File**. The Windows Explorer pop-up window opens. For Mac users, the Finder pop-up window opens.

3.1.8 Select the file to be attached. Click **Open**. The file is attached and ready to be saved.

3.1.9 Type a file description in the **File Description** field, if desired.

3.1.10 Click **Save**. The letter is attached to the provider, survey, intake or enforcement.

3.2 Generate a Letter from an Existing Template

3.2.1 Click **Letters** on the left menu to go to **Letters**. See *Figure 8, Letters*. The **Letters** page opens.

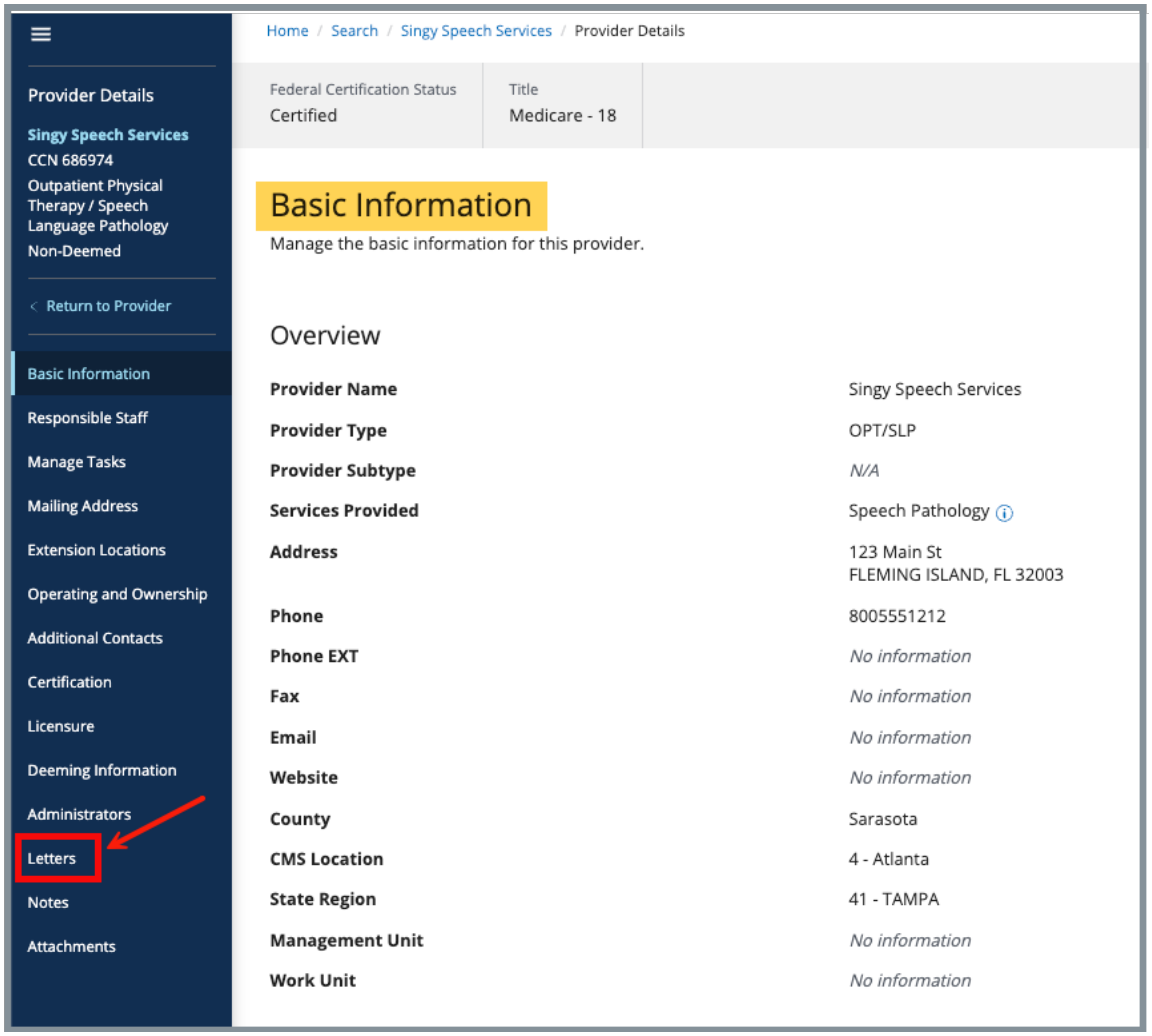

Figure 8: Letters

3.2.2 Click **Add Letter**. See *Figure 9, 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 the Generate from template step.

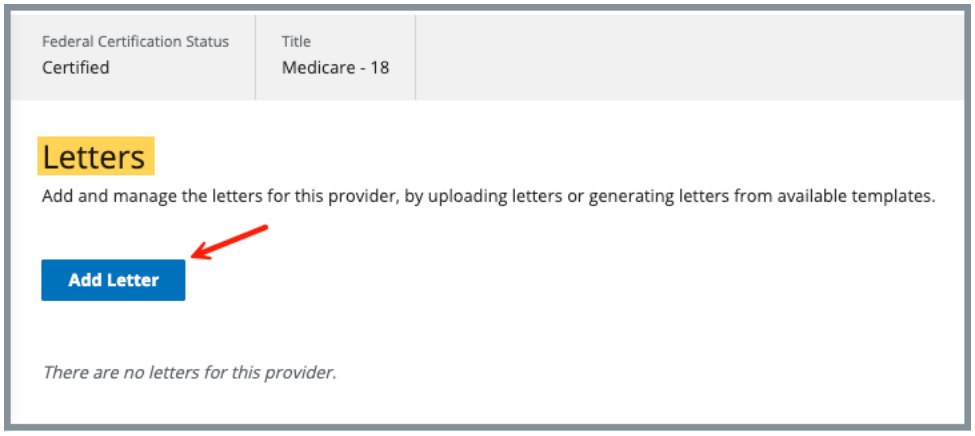

Figure 9: Add Letter

3.2.3 Type the letter name under **Letter Name**. See *Figure 10, Letter Overview Page.*

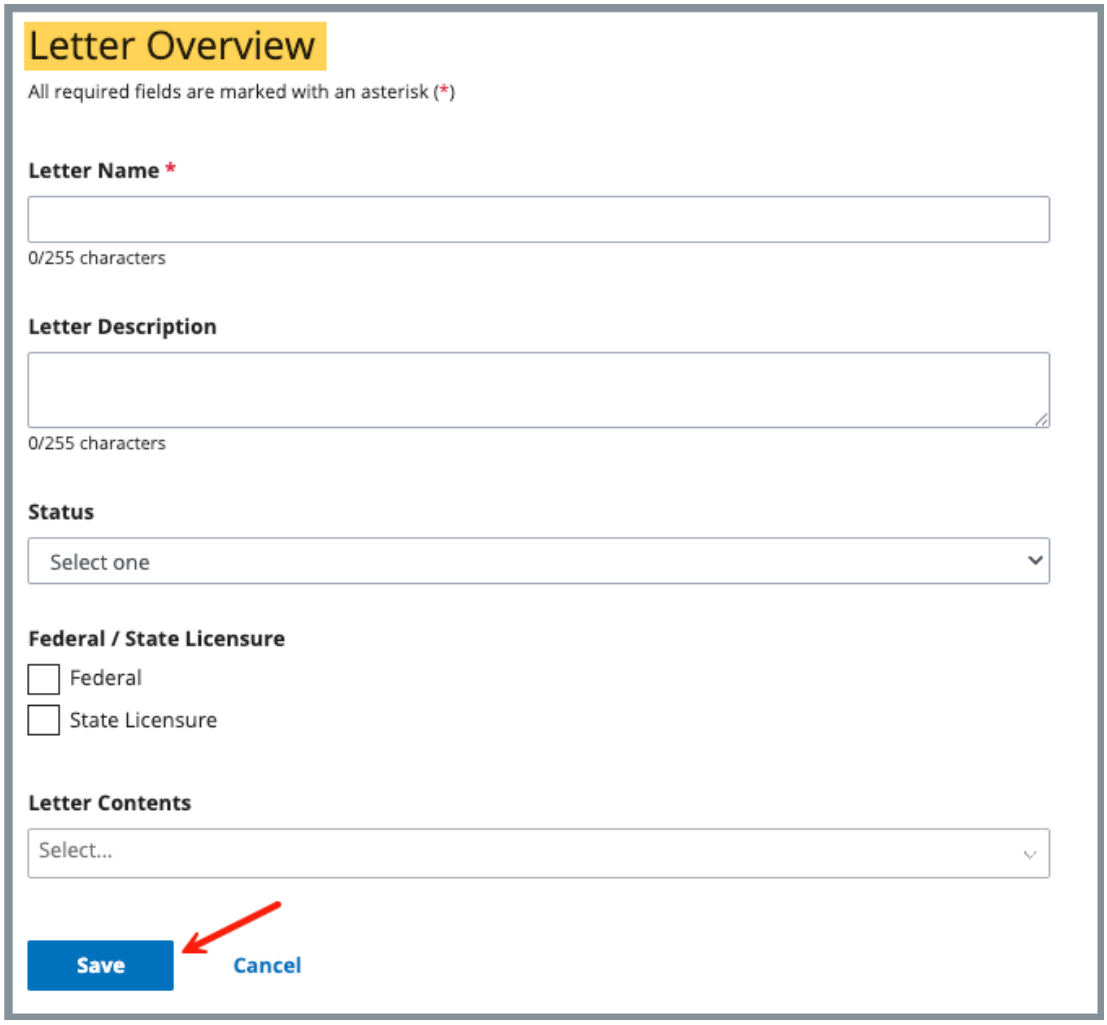

Figure 10: Letter Overview Page

3.2.4 Fill out any additional information, if desired.

3.2.5 Click **Save.** The **Letter: [Template Name]** page opens. See *Figure 11, Letter Page.*

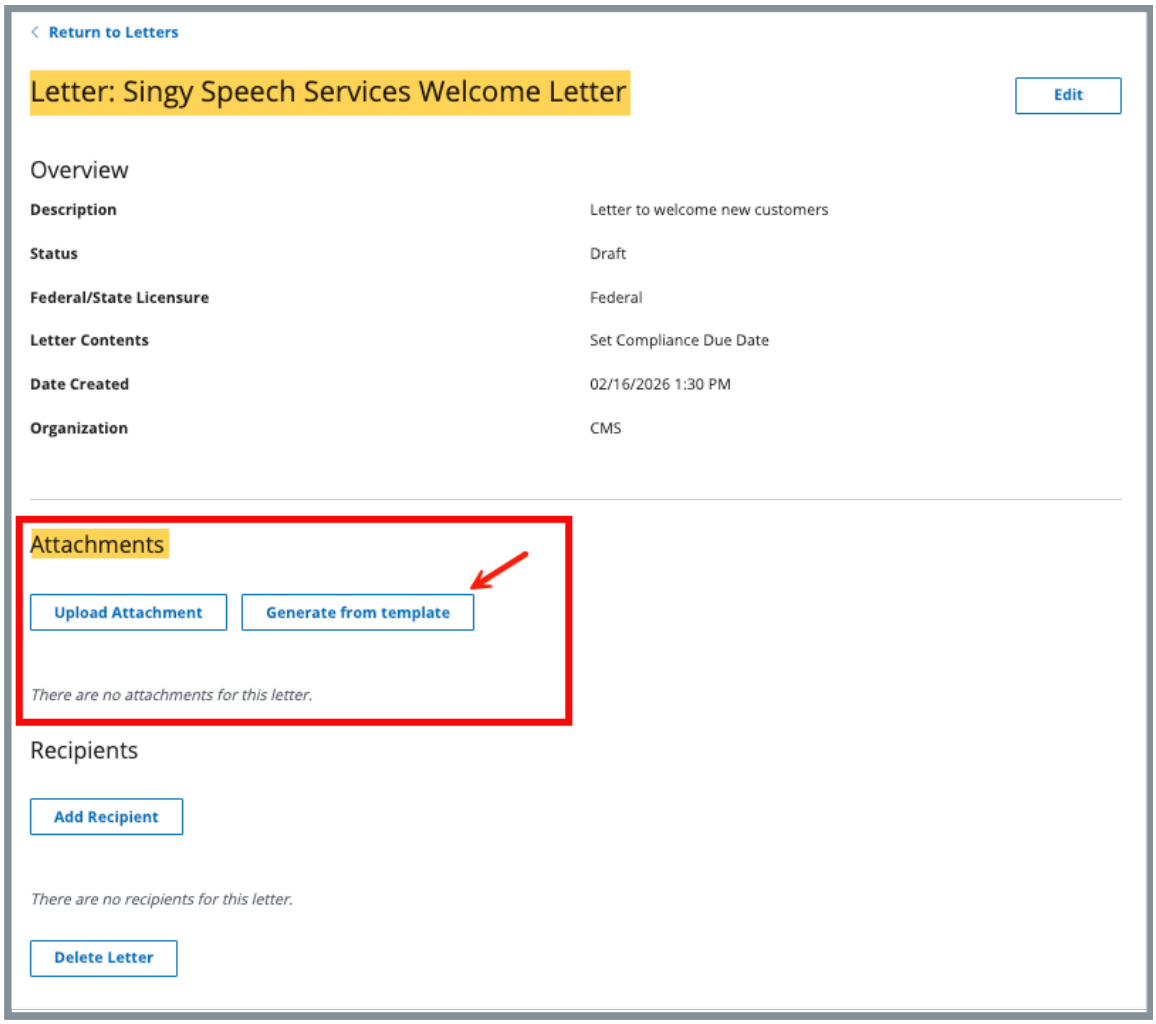

Figure 11: Letter Page

3.2.6 Scroll down to the **Attachments** section.

3.2.7 Click **Generate from template** under **Attachments.** The **Select a template** page opens. See *Figure 12, Select a Template.*

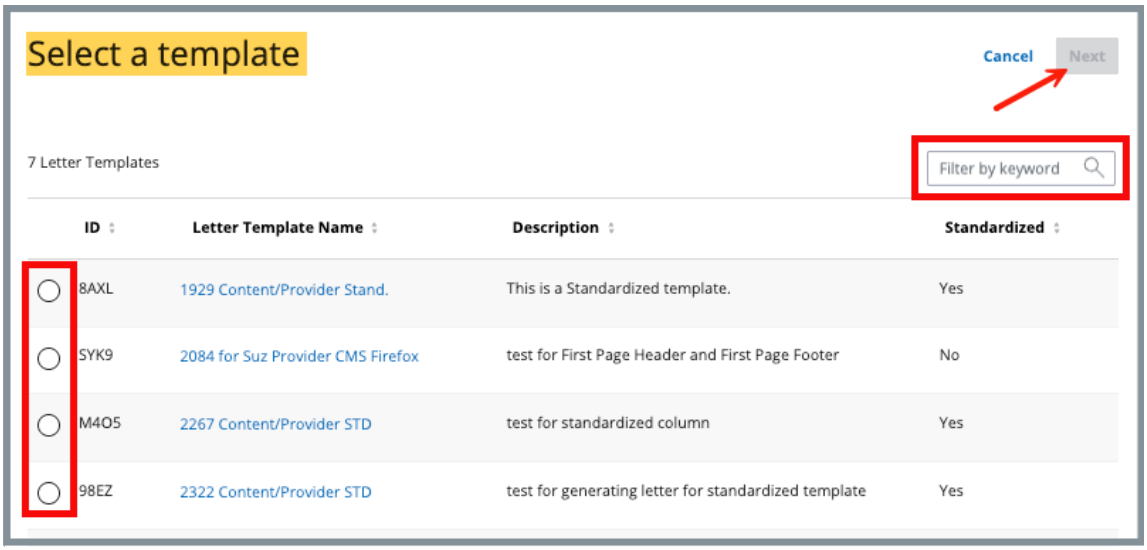

Figure 12: Select a Template

3.2.8 Click the circle next to the desired template.

3.2.9 Click **Next**. The **Generate attachment** page opens.

Notes:

- Review Generate a Letter Using Multiple Template Areas to generate a template using two or more template areas.
- **Next** is disabled until a selection is made.

3.2.10 Update the template as desired. See *Figure 13, Letter Template*.

Notes:

- Only nonstandardized templates can be modified. Textholders can be removed, words can be edited and updated. Refer to the Letter Template Management User Manual on QTSO to edit the original template and for a list of textholders
- Custom textholders require information to be inserted. Refer to Add Text to a Custom Textholder.
- 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.

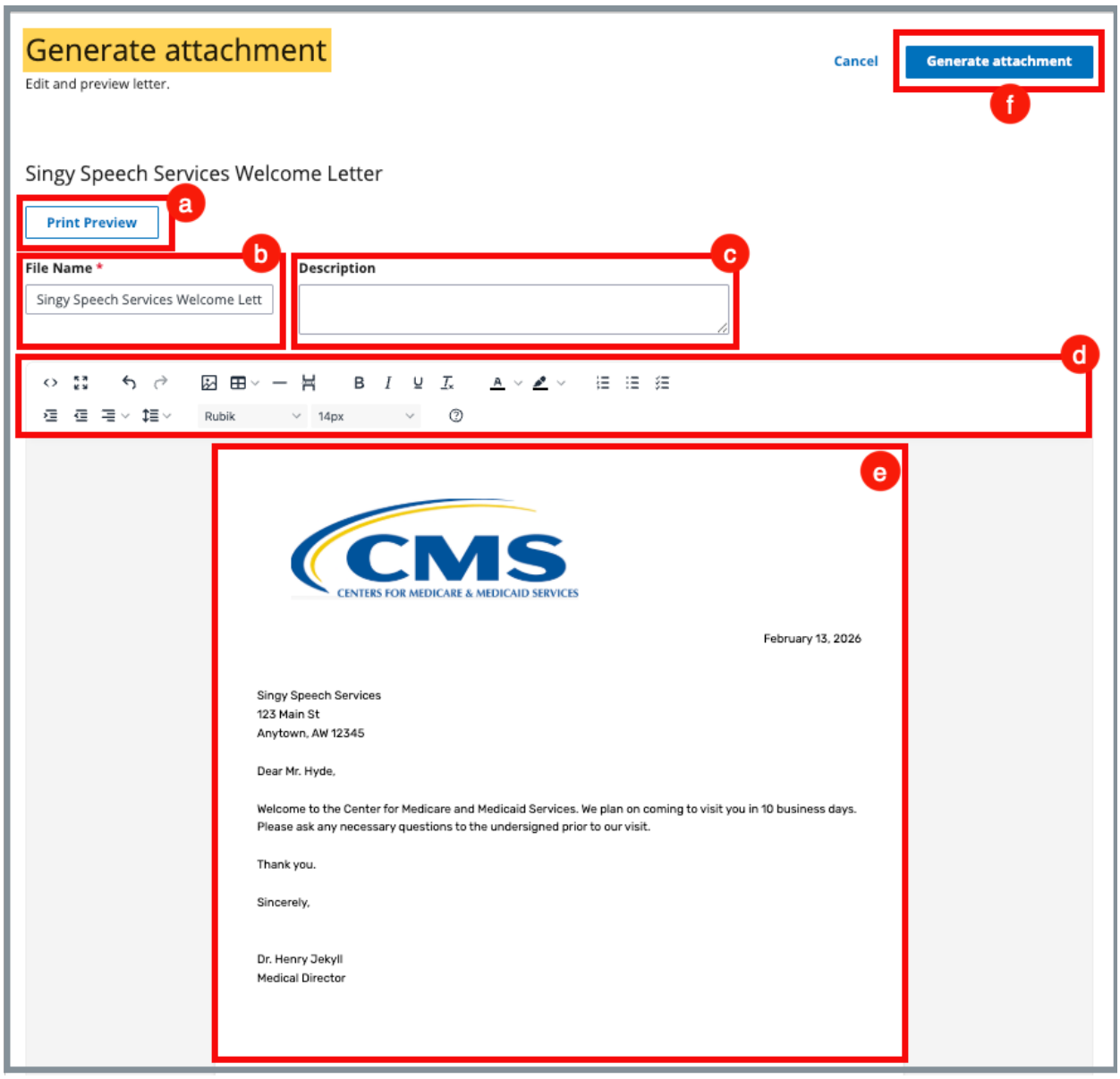

Figure 13: Letter Template

Table 2: Letter Template Detailed Callout

No.	Section Detail	Description
a	**Print Preview**	Select **Print Preview** to view the PDF version of the letter. The PDF can also be downloaded from this view.
b	**File Name**	Edit the template name, if needed.
c	**Description**	Type keywords to support content discovery. Keywords describe the template and help users locate it. For example, a template titled *Unsubstantiated Claim* might use the keywords federal and minor. Separate keywords with commas.
d	**Formatting**	The format menu supports content edits such as text styling and bullet formatting. See Appendix A for details on each icon in the menu.
e	**Letter**	Displays the rendered letter. Verify inputs and apply changes for nonstandardized templates, if needed.
f	**Generate attachment**	Click **Generate attachment** to create a PDF that attaches to provider/survey/intake/enforcement record.

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

3.2.12 Verify the letter appears under **File Name**. See *Figure 14, Letter Attachment*.

Notes:

- Click the file name to automatically download the letter to the user's computer.
- Review Finalize an Attachment to prevent further changes to the letter after upload.

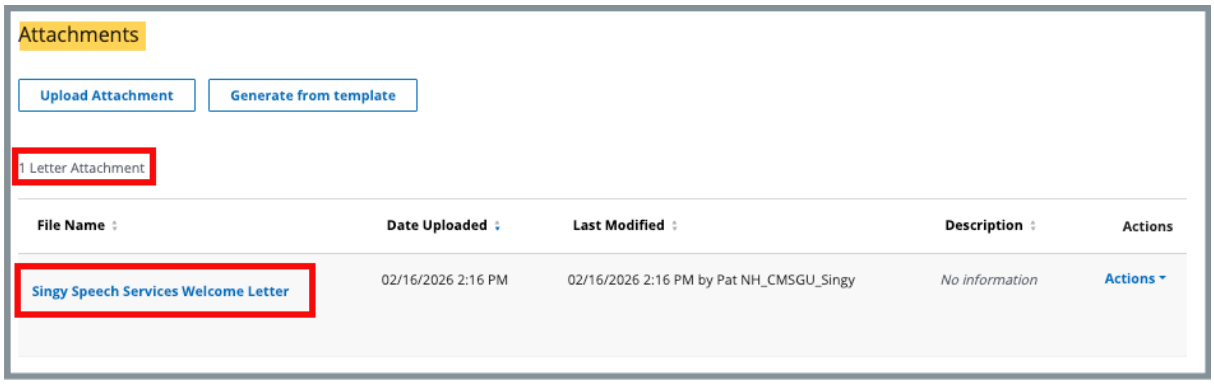

Figure 14: Letter Attachment

3.3 Generate a Letter Using Multiple Template Areas

Purpose: To generate a letter from a template that includes textholders from more than one area.

Note: At least two template areas (i.e., provider, survey, intake, enforcement) must be used to follow this step.

3.3.1 Follow step 3.2.1 through 3.2.9 to generate a template.

Note: The **Enter Letter Values** window opens after the template is selected and **Next** is clicked.

3.3.2 Review **Select Values**. See *Figure 15, Select Values*.

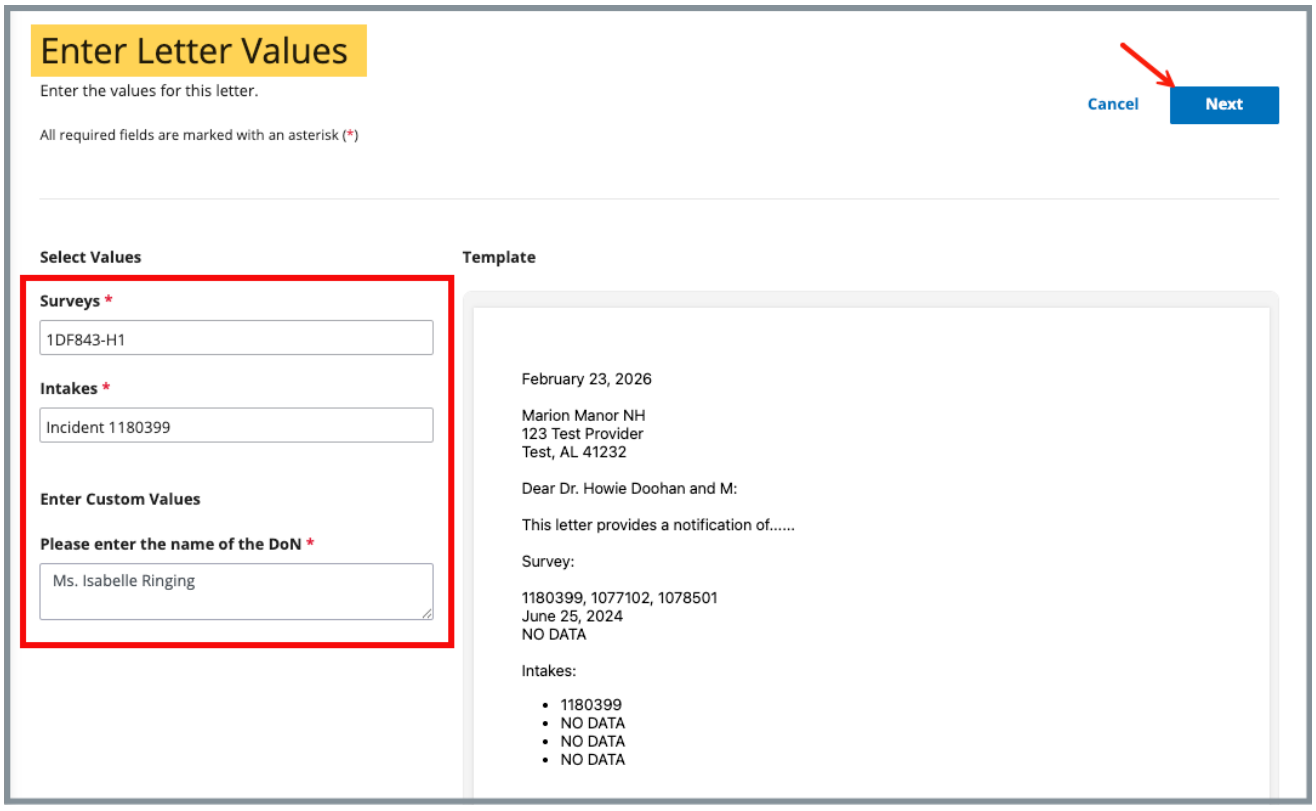

Figure 15: Select Values

a. Select a survey under **Surveys**.

Note: A survey is automatically selected when only one survey is available.

b. Select an intake under **Intakes**.

Note: An intake is automatically selected when only one intake is available.

c. Type Custom Value, if needed.

Notes:

- A **Custom Value** is only available when a custom textholder has been added to the letter.
- There may be more than one **Custom Value**.
- Review Add Text to a Custom Textholder for more information.

3.3.3 Continue with step 3.2.10 to update the template, if needed.

Note: Do not click **Next** until template is updated.

3.4 Add Text to a Custom Textholder

3.4.1 The **Enter Custom Textholder Text** pop-up window opens in the template. See *Figure 16, Enter Custom Textholder Text Pop-Up Window*.

Note: Add information to **Custom Textholders** when a template includes **Custom Textholders**. The pop-up window opens automatically.

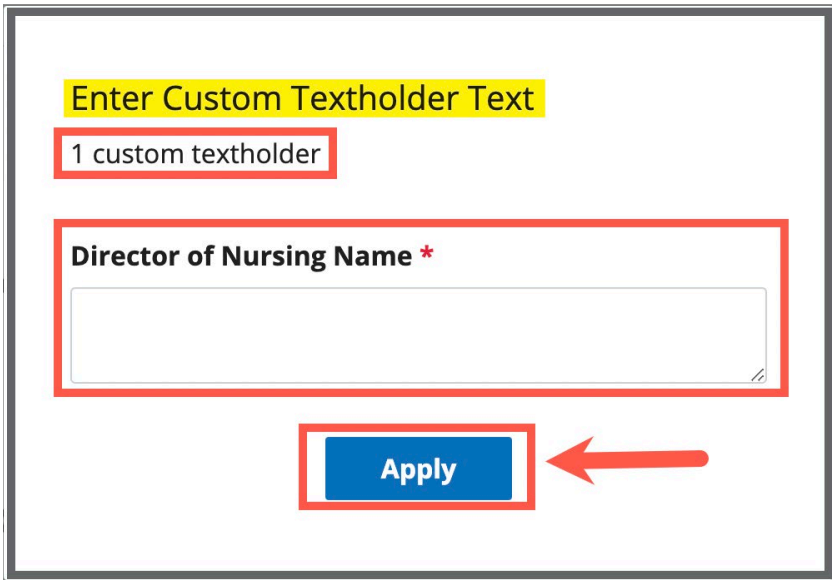

Figure 16: Enter Custom Textholder Text Pop-Up Window

3.4.2 Complete the prompt(s).

Note: There may be more than one custom textholder to fill out.

3.4.3 Click **Apply**.

3.4.4 The **Generate attachment from template page** opens.

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

3.5 Add Recipients to a Letter

3.5.1 Click **Add Recipient** to add a recipient. The Add Recipient page opens. See *Figure 17, Add Recipient*.

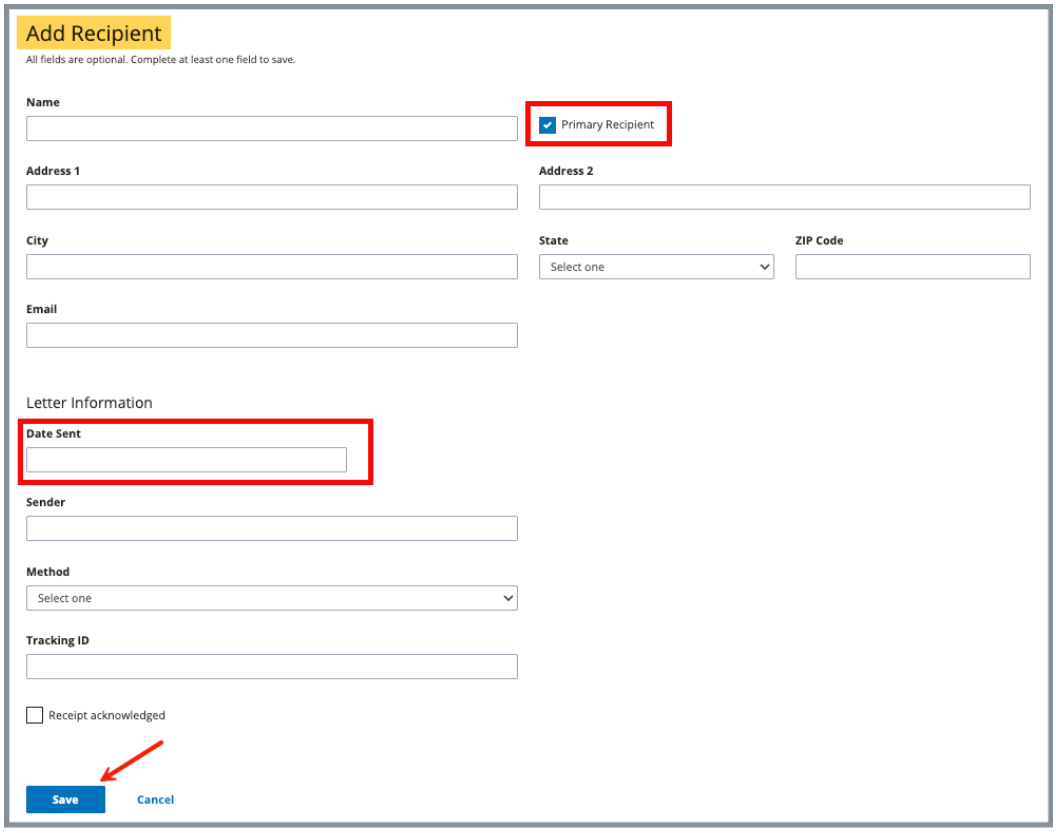

Figure 17: Add Recipient

3.5.2 Fill out the information.

Notes:

- **Primary Recipient** is automatically checked for the first recipient of the letter. It is grayed out for subsequent recipients.
- **Letter Information** is not automatic and must be filled out manually.
- **Date Sent** is the date the letter was sent.

3.5.3 Click **Save**. The **Recipient Information** updates. See *Figure 18, Recipient Information.*

Notes:

- Click **Return to Letter** to return to the Letter Overview page.
- Click **Add Recipient** under the **Actions** menu on the Letter Overview page to add additional recipients.

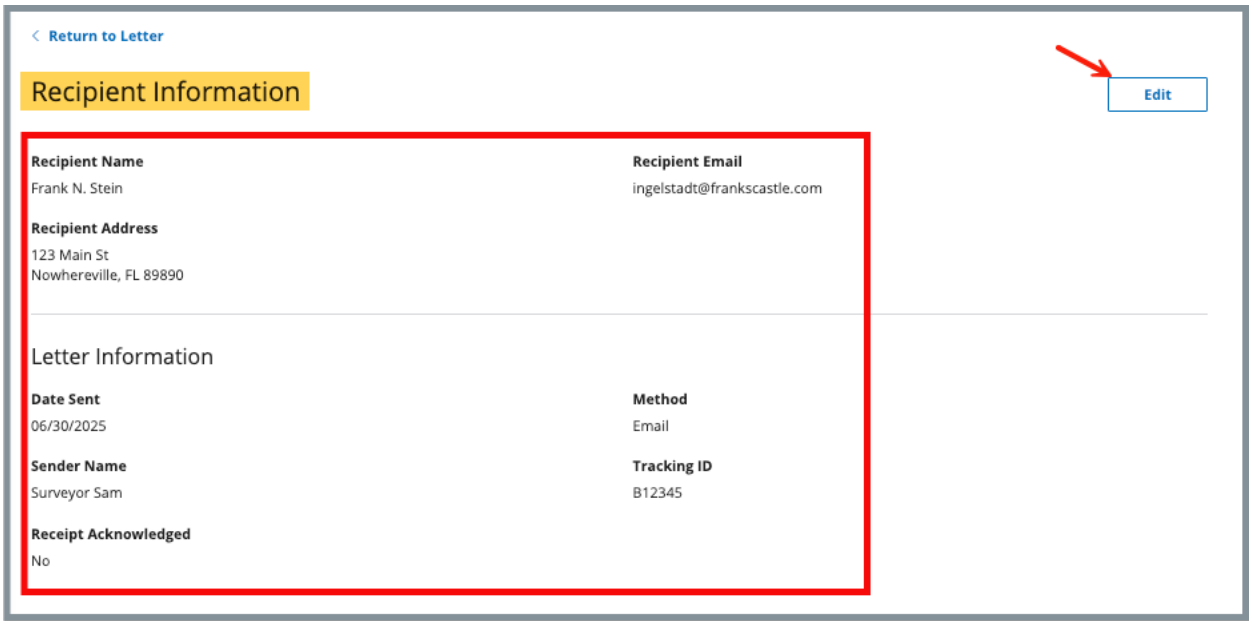

Figure 18: Recipient Information

3.6 Edit a Letter Overview

3.6.1 Click **Edit Overview** from the **Actions** drop-down menu to edit a Letter Overview. See *Figure 19, Edit a Letter Overview*. The **Edit Letter Overview** opens. See *Figure 20, Edit Letter Overview*.

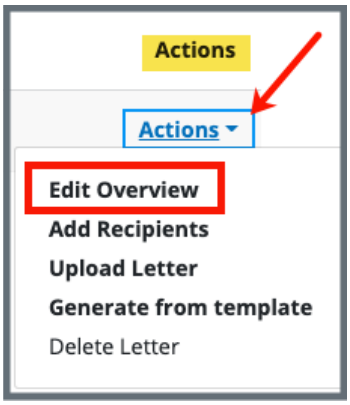

Figure 19: Edit a Letter Overview

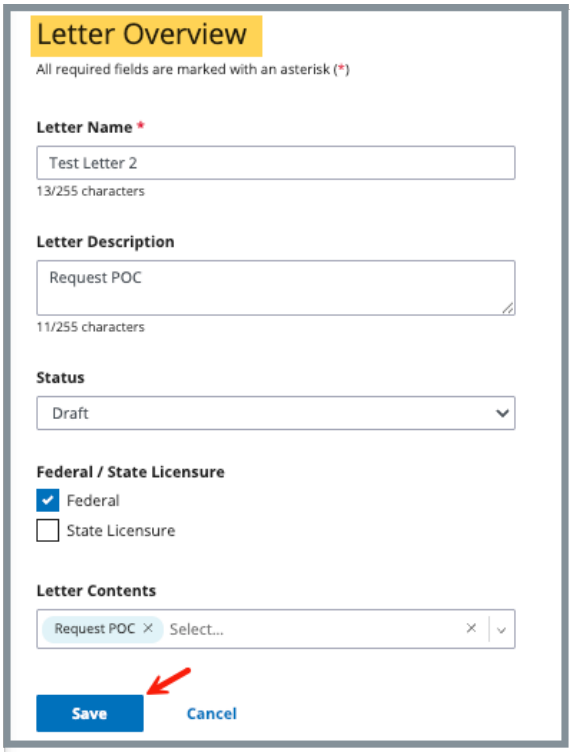

Figure 20: Edit Letter Overview

3.6.2 Update fields.

3.6.3 Click **Save**.

3.7 Edit a Standardized Letter Attachment Description

Note: Standardized letters cannot be edited or changed. Only the **Description** can be updated.

3.7.1 Select a standardized template. The **Create attachment** page opens.

3.7.2 Edit or add a description in the **Description** field. See *Figure 21, Standardized Letter Description.*

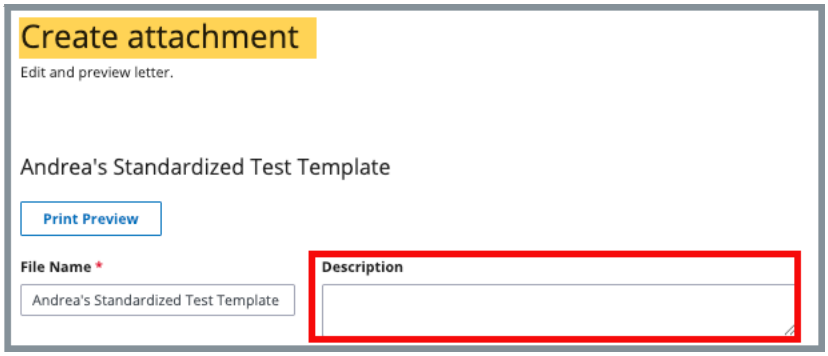

Figure 21: Standardized Letter Description

3.7.3 Click **Create Attachment**.

3.8 Edit a Nonstandardized Letter Attachment

Notes:

- Only letters generated from nonstandardized templates can be edited after the PDF is created.
- Finalized letters cannot be edited.

3.8.1 Click the letter name on the **Letters** page. See *Figure 22, Click Letter Name.* The letter detail page opens with **Overview**, **Attachments**, and **Recipients** sections. See *Figure 23, Letter Details Page.*

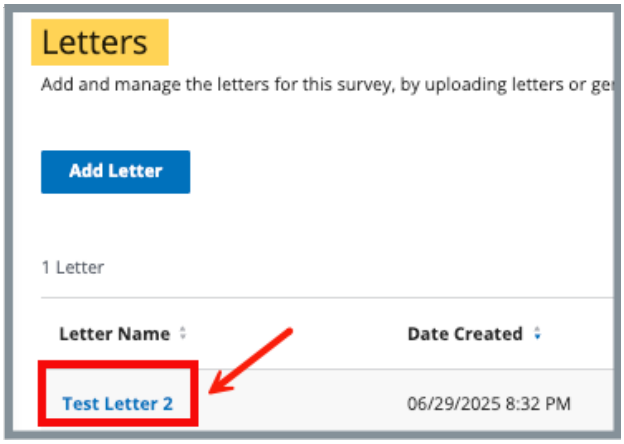

Figure 22: Click Letter Name

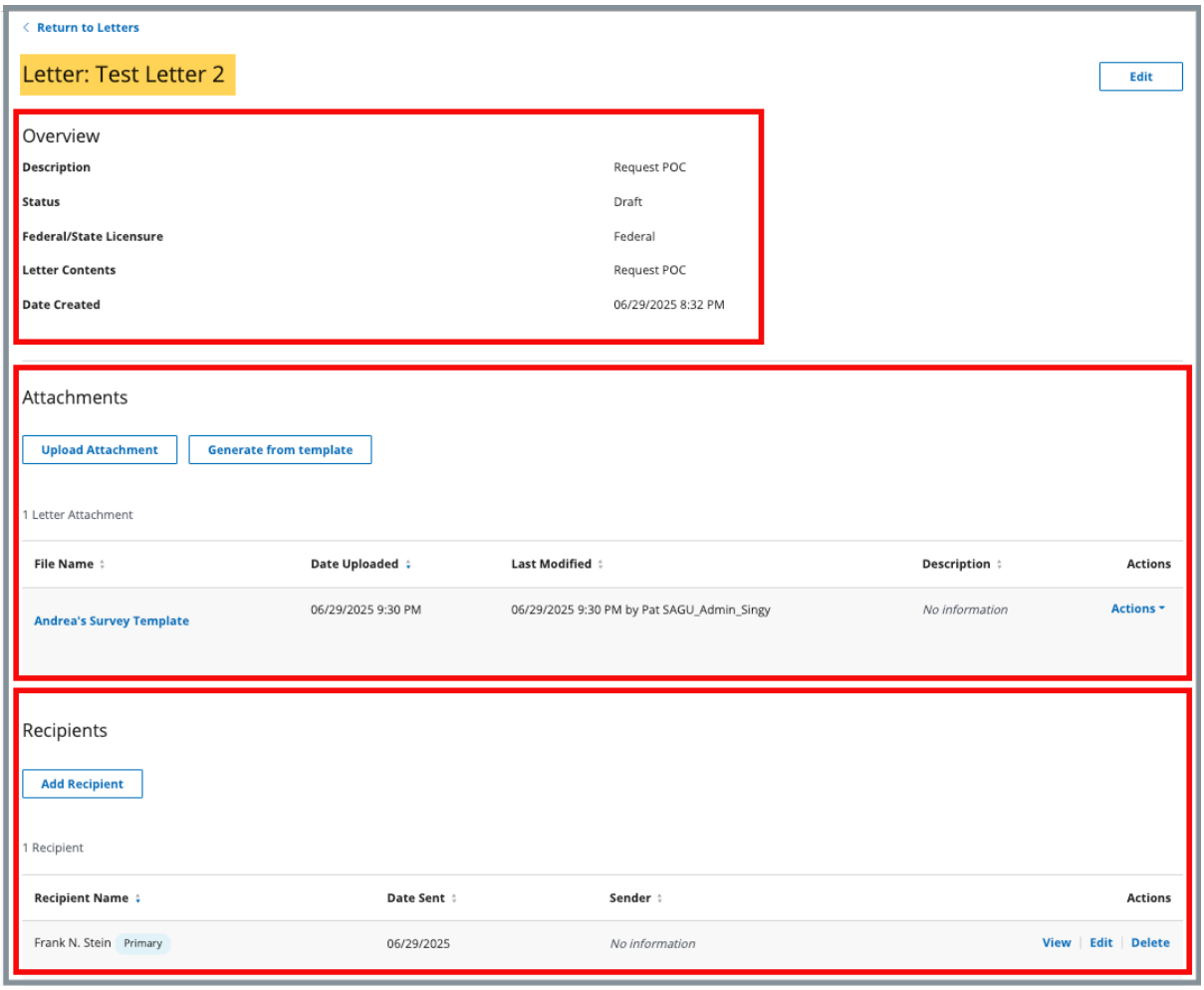

Figure 23: Letter Details Page

3.8.2 Scroll to the **Attachments** section.

3.8.3 Select **Edit** from the drop-down list under **Actions**. See *Figure 24, Edit.* The **Edit Attachment** page opens.

Note: **Last Modified** shows the date, time, and author (user) of the last modification of the file. **Last Modified** is updated each time the file is modified.

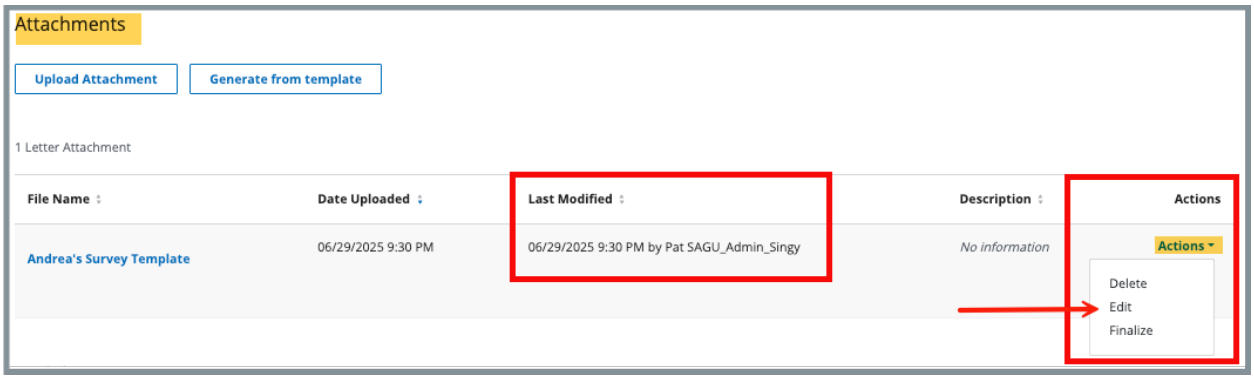

Figure 24: Edit

3.8.4 Make any necessary changes. See *Figure 25, Edit Attachment Page*.

Note: See **Appendix A** for tips and tricks for working in a template.

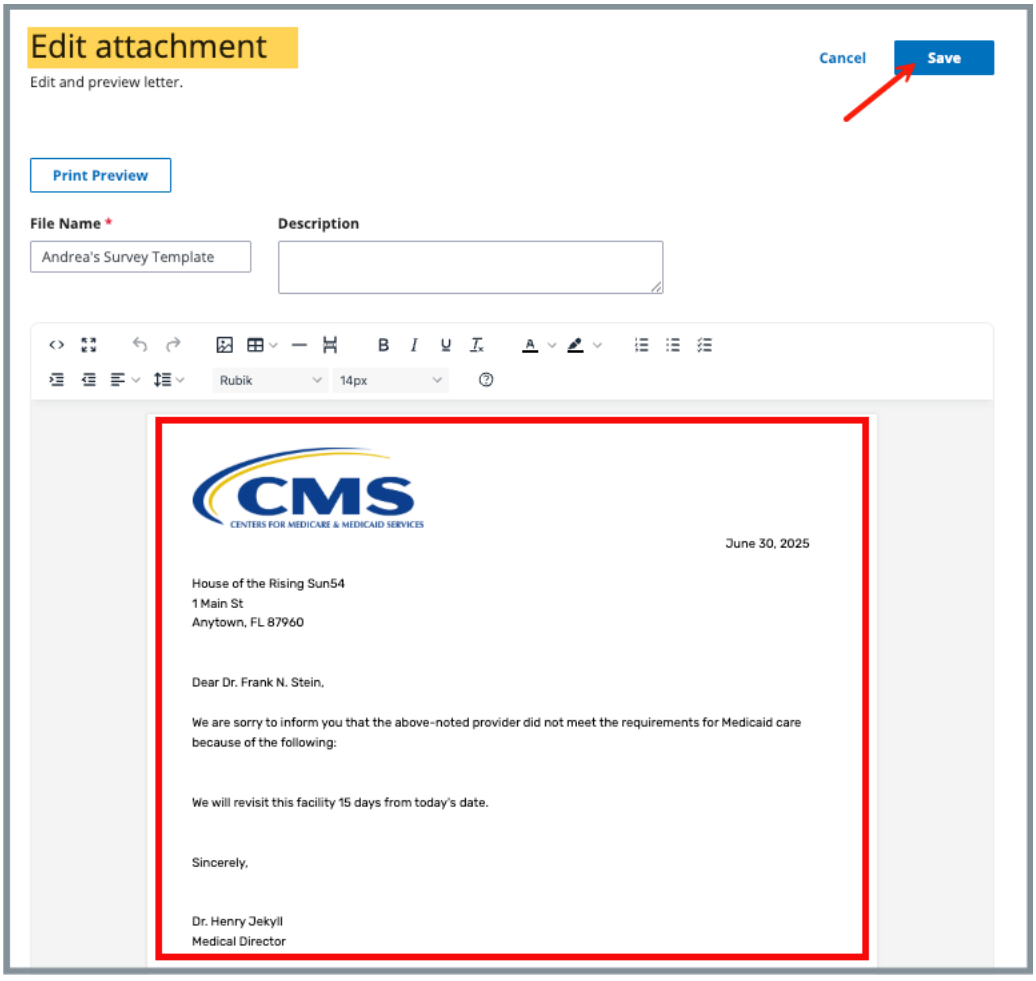

Figure 25: Edit Attachment Page

3.8.5 Click **Save**.

Note: The letter can now be regenerated with these changes.

3.9 Finalize a Letter Attachment

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

Notes:

- No changes can be made once a letter is finalized.
- The letter has been generated from the template and is attached to the provider, survey, intake, or enforcement record.

3.9.1 Select **Finalize** from the **Actions** drop-down menu to finalize a letter attachment. See *Figure 26, Finalize Letter.* A pop-up window opens.

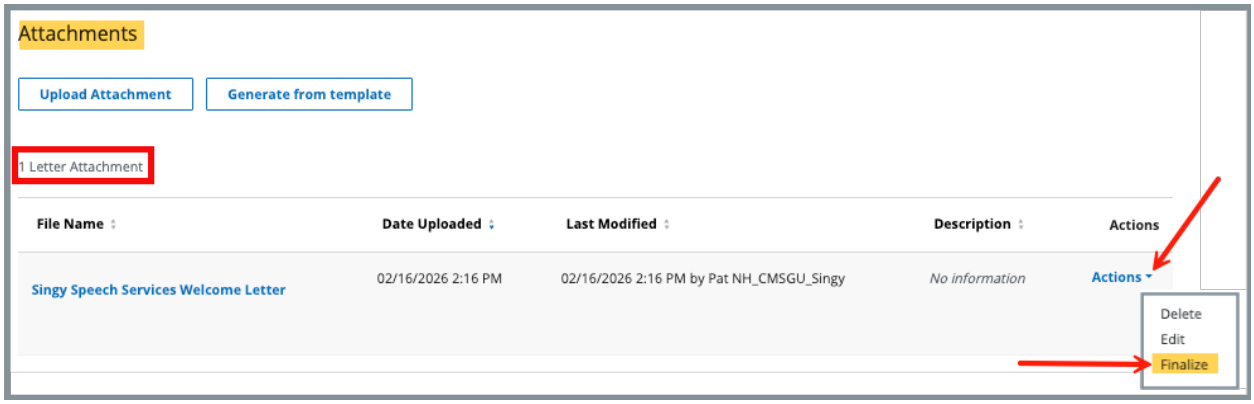

Figure 26: Finalize Letter

3.9.2 Click **Finalize**. See *Figure 27, Finalize Pop-Up Window.*

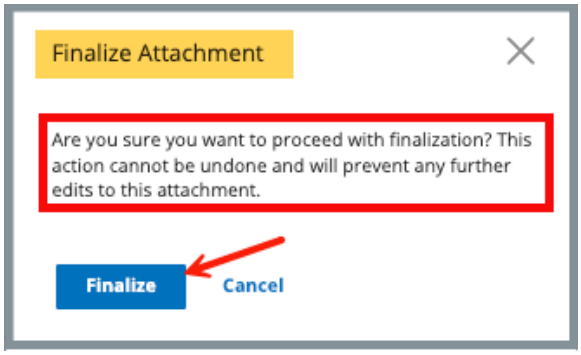

Figure 27: Finalize Letter Pop-Up Window

3.9.3 Verify the letter is finalized under **Actions**. See *Figure 28, Finalized*.

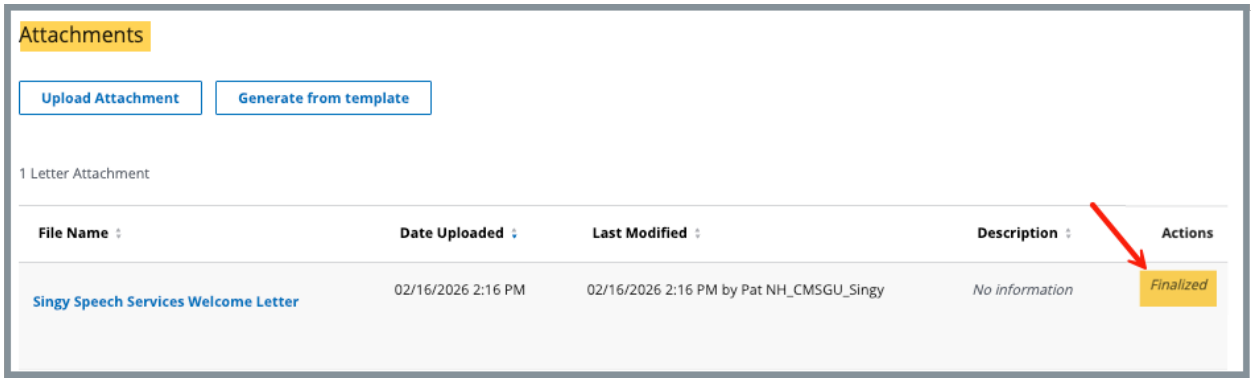

Figure 28: Finalized

3.10 Delete a Letter Attachment

Note: Letters can only be deleted when no attachments are finalized.

3.10.1 Select **Delete** from the **Actions** drop-down menu to delete a letter. A pop-up window opens. See *Figure 29, Delete Letter Pop-Up Window*.

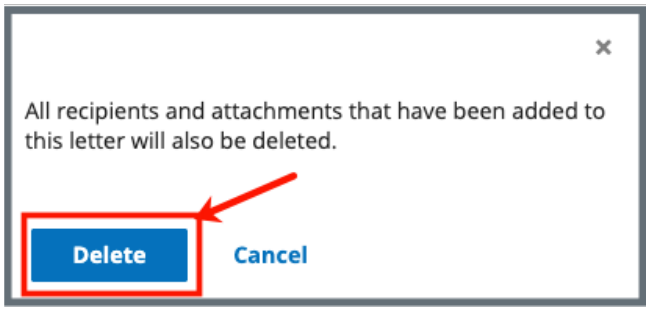

Figure 29: Delete Letter Pop-Up Window

3.10.2 Click **Delete**. The letter is removed from the list.

4. Notes

Purpose: To add or review any notes.

Note: Notes added here are intended for the provider, survey, intake, or enforcement in general. Some areas, such as Long Term Care surveys, may have additional note choices. Those notes apply only to the area in which they are found. For example, Surveyor Notes, which can only be found in the LTCSP section of the survey.

4.1 Click **Notes** on the left menu to view existing notes or add a note. See *Figure 30, Add Note***.**

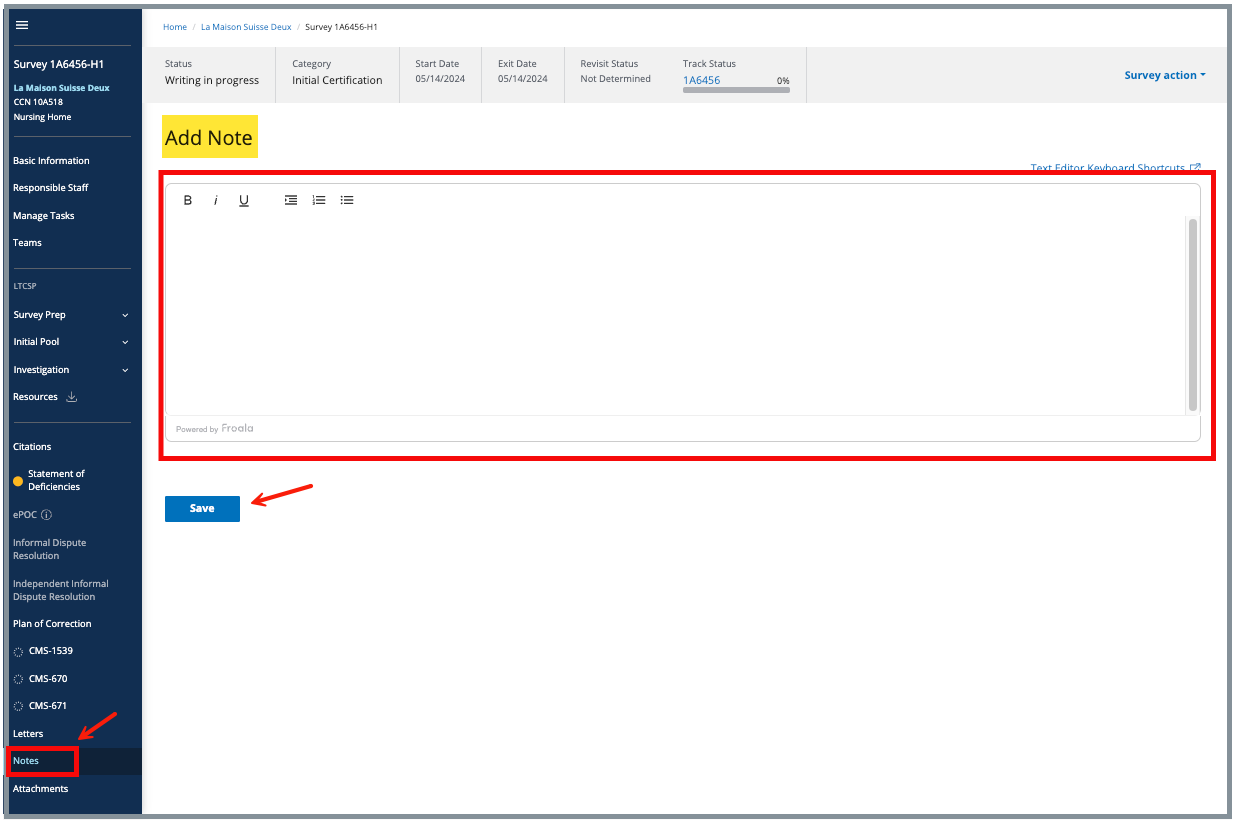

Figure 30: Add Note

4.2 Type notes in blank field.

4.3 Click **Save**. The **Notes** window opens with note information. See *Figure 31, Notes.*

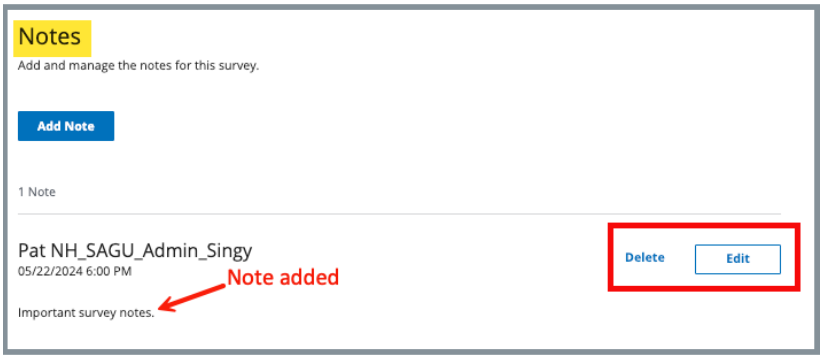

Figure 31: Notes

Note: Click **Edit** to edit information, if desired. It is not possible to edit or delete a note created by another user.

4.4 Click **Delete** to delete a note. A pop-up note opens. See *Figure 32, Delete Note Pop-Up Window.*

Figure 32: Delete Note Pop-Up Window

4.5 Click **Delete**. The updated **Notes** page opens.

5. Attachments

Purpose: To add copies of images and letters to a provider, survey, intake or enforcement.

Notes:

- Only one attachment can be added at a time.
- Attachments cannot be deleted. Contact the iQIES Service Center to delete any attachments. This restriction applies to attachments only. Letters may be deleted when no attachments are finalized.

5.1 Click **Attachments** on the left menu. The **Attachments** window opens. See *Figure 33, Attachments*.

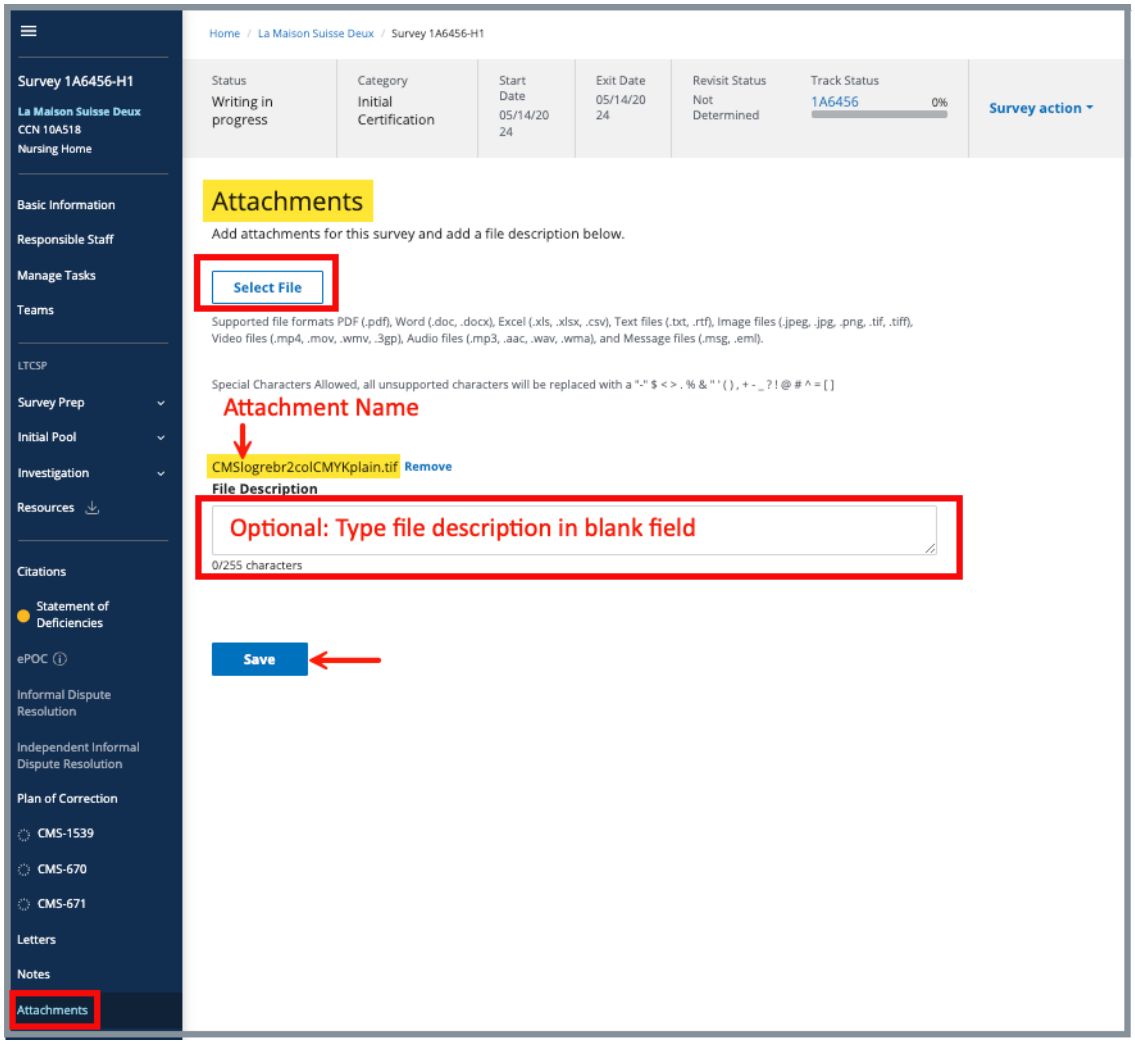

Figure 33: Attachments

5.2 Click **Select File**. The Windows Explorer pop-up window opens. For Mac users, the Finder pop-up window opens.

5.3 Select the file to be attached. Click **Open**.

5.4 Type a file description in the **File Description** field, if desired.

5.5 Click **Save**. The file is attached to the provider, survey, intake, or enforcement. See *Figure 34, Attachment.*

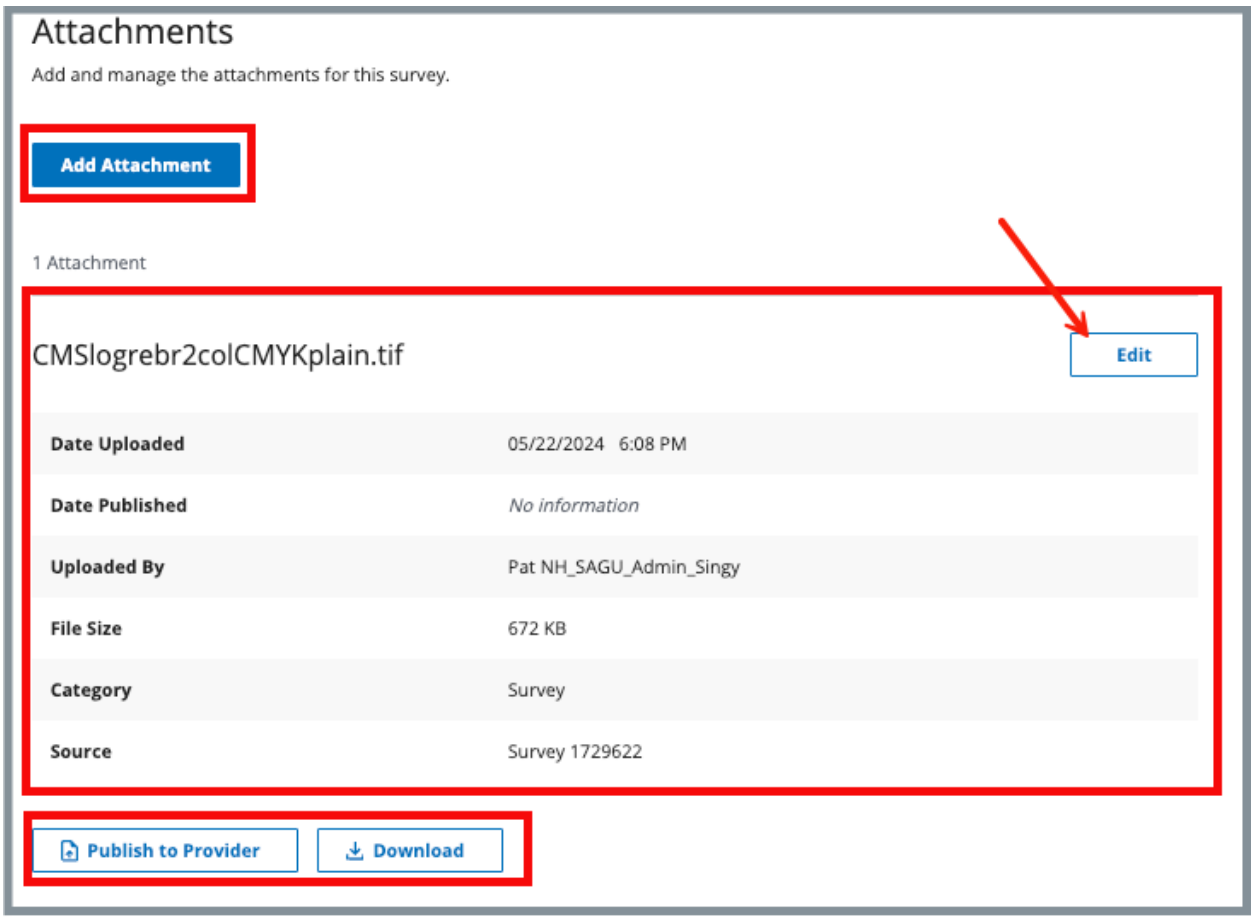

Figure 34: Attachment

5.6 Click **Add Attachment** to add additional attachments.

5.7 Click **Edit** to edit the attachment. The file can be deleted, or the description can be edited.

5.8 Click **Publish to Provider** to publish to the provider. The **Publish to Provider** link then shows as **Unpublish to Provider**. See *Figure 35, Unpublish To Provider*. Click again to toggle.

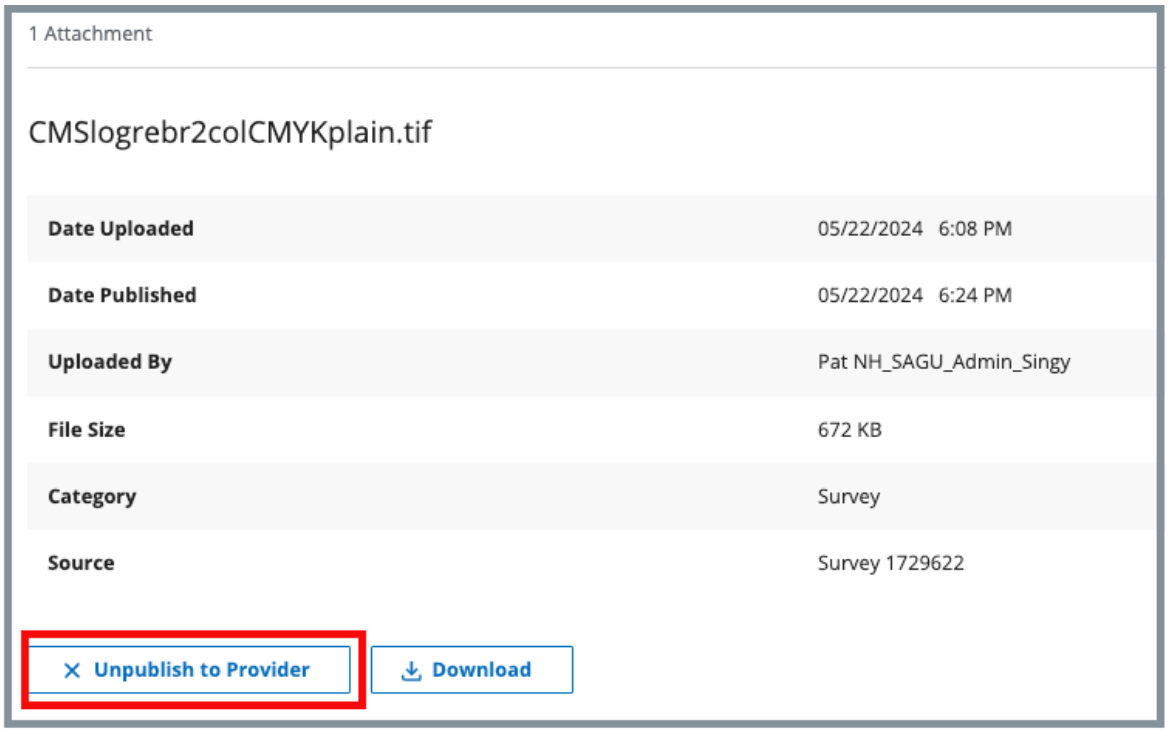

Figure 35: Unpublish To Provider

5.9 Click **Download** to download the attachment.

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 36, Letter Template Format Menu for* a few tips and tricks to help.

Template Menu

Figure 36: Letter Template Format Menu

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