



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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Table of Contents

1. Introduction	1
1.1 Getting Started in S&C – Important Information to Know	1
1.2 iQIES Service Center	4
1.3 Roles and Permissions	5
2. Letters, Notes, and Attachments Overview	6
3. Letters	7
3.1 Add/Upload a Letter	7
3.2 Generate a Letter from an Existing Template	10
3.3 Generate a Letter Using Multiple Template Areas	18
3.4 Add Text to a Custom Textholder	20
3.5 Add Recipients to a Letter	21
3.6 Edit a Letter Overview	23
3.7 Edit a Standardized Letter Attachment Description	24
3.8 Edit a Nonstandardized Letter Attachment	25
3.9 Finalize a Letter Attachment	29
3.10 Delete a Letter Attachment	31
4. Notes	32
5. Attachments	34
Appendix A: Tips and Tricks for Working in a Template	37

List of Figures

Figure 1: Expandable Field	1
Figure 2: Notification Banner	2
Figure 3: Tool Tip Icon.....	3
Figure 4: Help Icon	5
Figure 5: Letters	7
Figure 6: Letter Overview.....	8
Figure 7: Letter Attachment and Recipient	9
Figure 8: Letters	10
Figure 9: Add Letter	11
Figure 10: Letter Overview Page	12
Figure 11: Letter Page	13
Figure 12: Select a Template.....	14
Figure 13: Letter Template.....	15
Figure 14: Letter Attachment.....	17
Figure 15: Select Values	18
Figure 16: Enter Custom Textholder Text Pop-Up Window	20
Figure 17: Add Recipient.....	21
Figure 18: Recipient Information	22
Figure 19: Edit a Letter Overview.....	23
Figure 20: Edit Letter Overview.....	23
Figure 21: Standardized Letter Description	24
Figure 22: Click Letter Name	25
Figure 23: Letter Details Page	26
Figure 24: Edit.....	27
Figure 25: Edit Attachment Page.....	27

Figure 26: Finalize Letter 29

Figure 27: Finalize Letter Pop-Up Window 29

Figure 28: Finalized 30

Figure 29: Delete Letter Pop-Up Window 31

Figure 30: Add Note 32

Figure 31: Notes 33

Figure 32: Delete Note Pop-Up Window 33

Figure 33: Attachments 34

Figure 34: Attachment 35

Figure 35: Unpublish To Provider 36

Figure 36: Letter Template Format Menu 37

List of Tables

Table 1: Notification Banner Color Descriptions 2

Table 2: Letter Template Detailed Callout 16

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*.

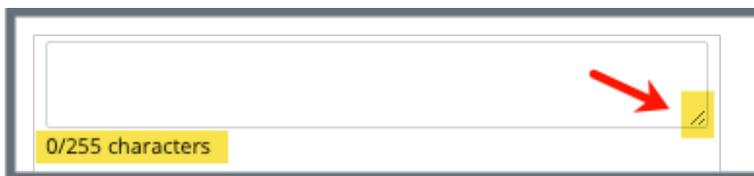


Figure 1: Expandable Field

- 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.

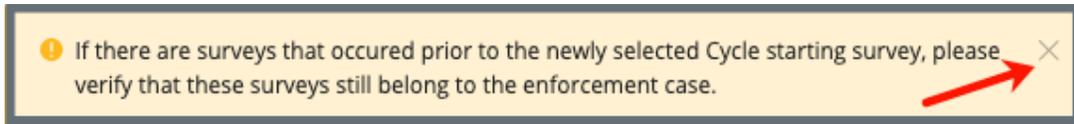


Figure 2: Notification Banner

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*.

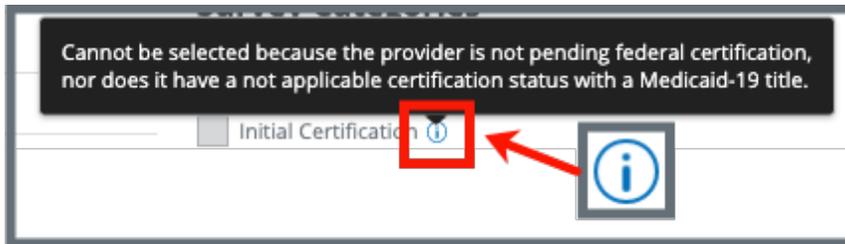


Figure 3: Tool Tip Icon

- 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*.

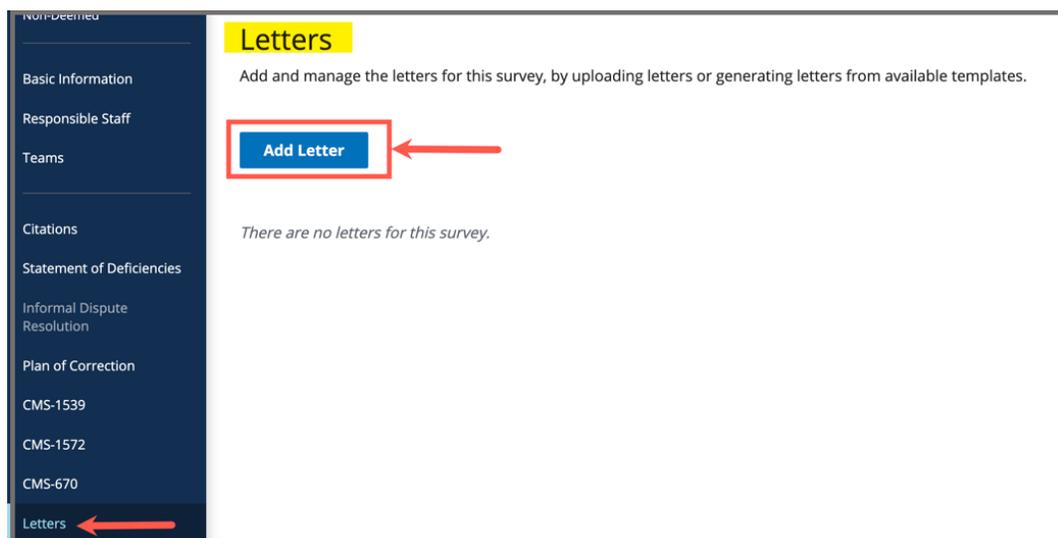
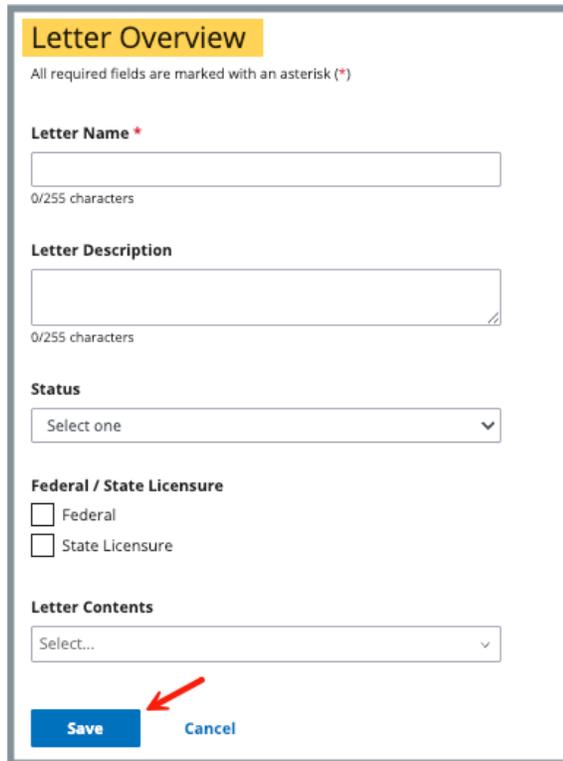


Figure 5: Letters

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



Letter Overview

All required fields are marked with an asterisk (*)

Letter Name *

0/255 characters

Letter Description

0/255 characters

Status

Select one

Federal / State Licensure

Federal

State Licensure

Letter Contents

Select...

Save Cancel

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*.

< Return to Letters

Letter: Test Letter 2 ← Letter Name Edit

Overview

Description	Request POC
Status	Draft
Federal/State Licensure	Federal
Letter Contents	Request POC
Date Created	06/29/2025 8:32 PM

Attachments

Upload Attachment Generate from template

There are no attachments for this letter.

Recipients

Add Recipient

There are no recipients for this letter.

Delete Letter

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.

The screenshot shows the 'Provider Details' page for 'Singy Speech Services'. The left sidebar menu includes options like 'Provider Details', 'Basic Information', 'Responsible Staff', 'Manage Tasks', 'Mailing Address', 'Extension Locations', 'Operating and Ownership', 'Additional Contacts', 'Certification', 'Licensure', 'Deeming Information', 'Administrators', 'Letters', 'Notes', and 'Attachments'. The 'Letters' option is highlighted with a red box and a red arrow. The main content area displays 'Basic Information' and an 'Overview' table with the following data:

Basic Information	
Manage the basic information for this provider.	
Overview	
Provider Name	Singy Speech Services
Provider Type	OPT/SLP
Provider Subtype	N/A
Services Provided	Speech Pathology ⓘ
Address	123 Main St FLEMING ISLAND, FL 32003
Phone	8005551212
Phone EXT	No information
Fax	No information
Email	No information
Website	No information
County	Sarasota
CMS Location	4 - Atlanta
State Region	41 - TAMPA
Management Unit	No information
Work Unit	No information

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.

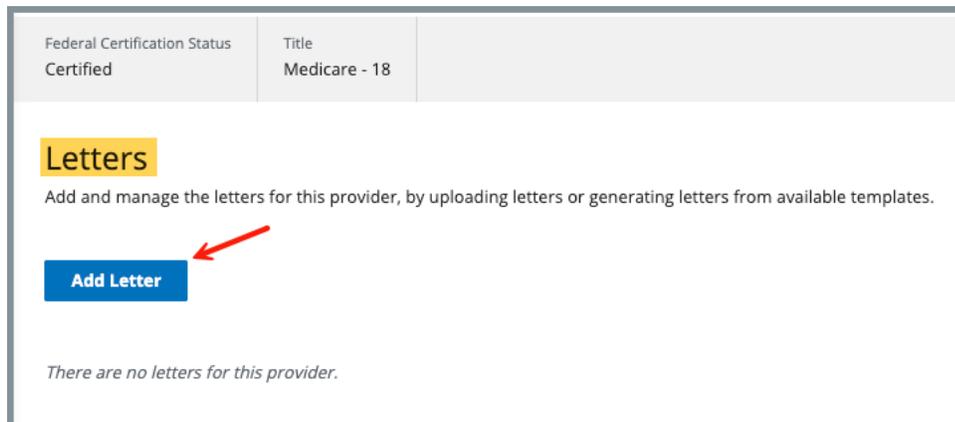


Figure 9: Add Letter

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

Letter Overview

All required fields are marked with an asterisk (*)

Letter Name *

0/255 characters

Letter Description

0/255 characters

Status

Select one ▼

Federal / State Licensure

Federal

State Licensure

Letter Contents

Select... ▼

Save
Cancel



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*.

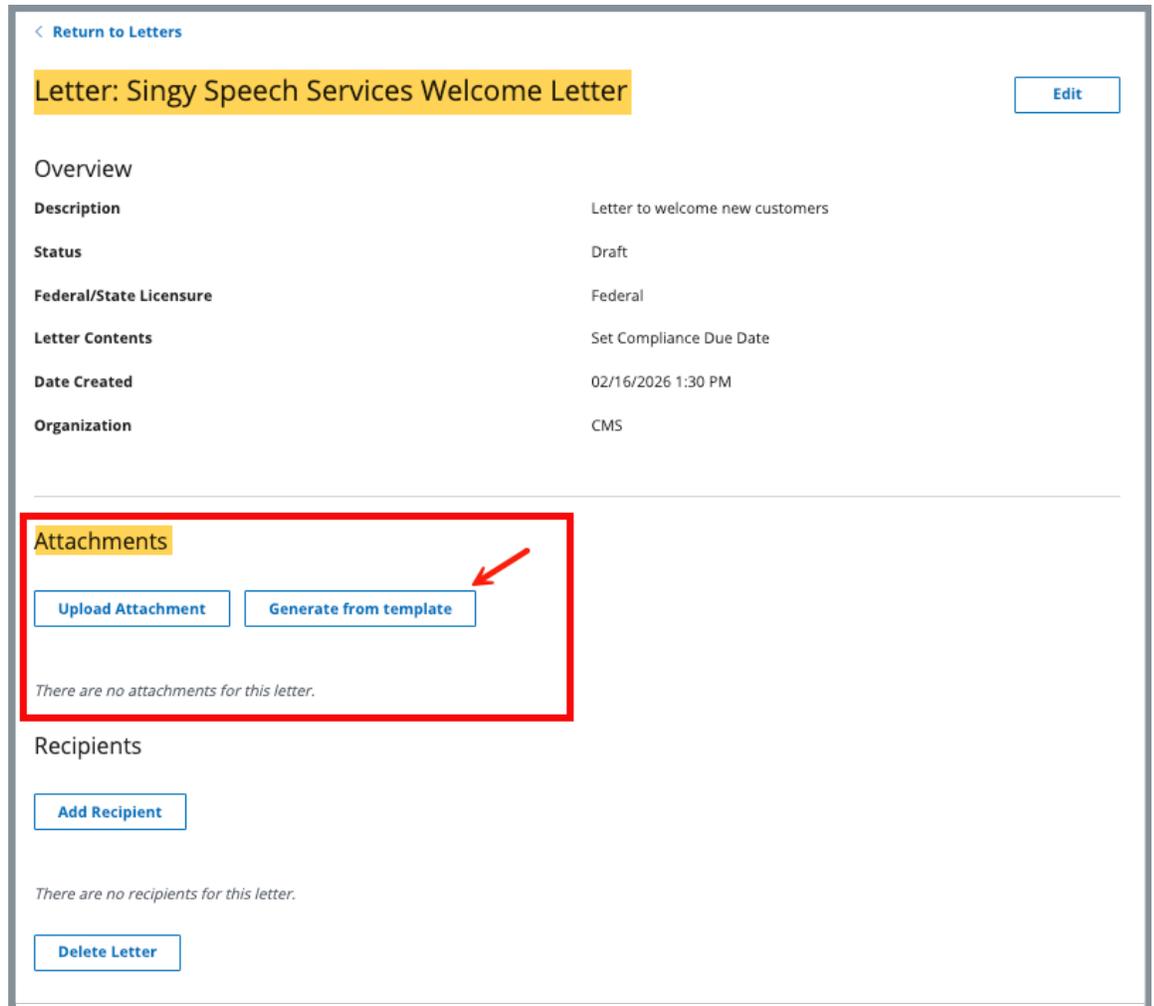


Figure 11: Letter Page

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*.

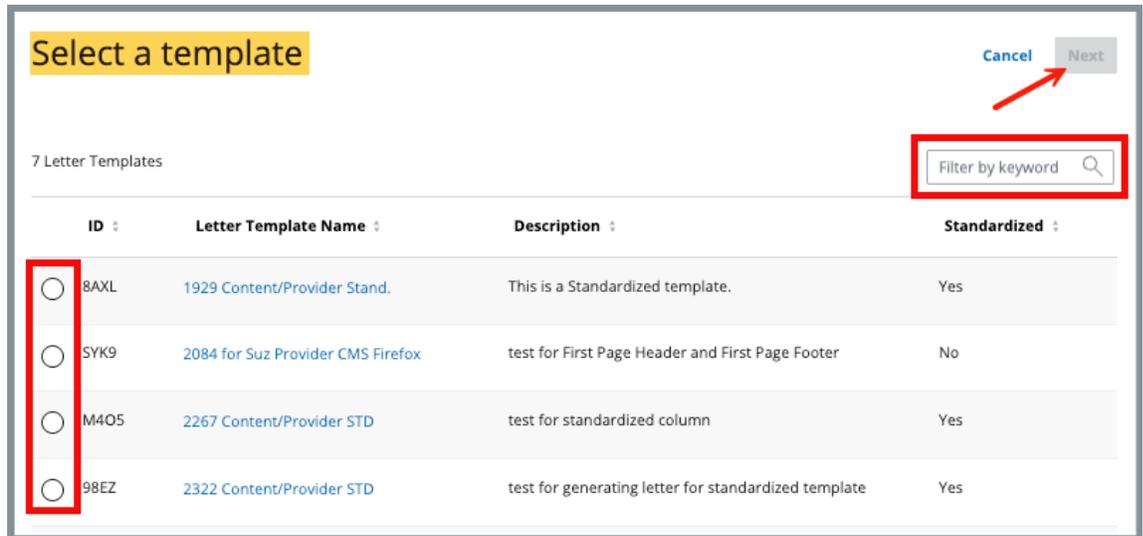


Figure 12: Select a Template

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.

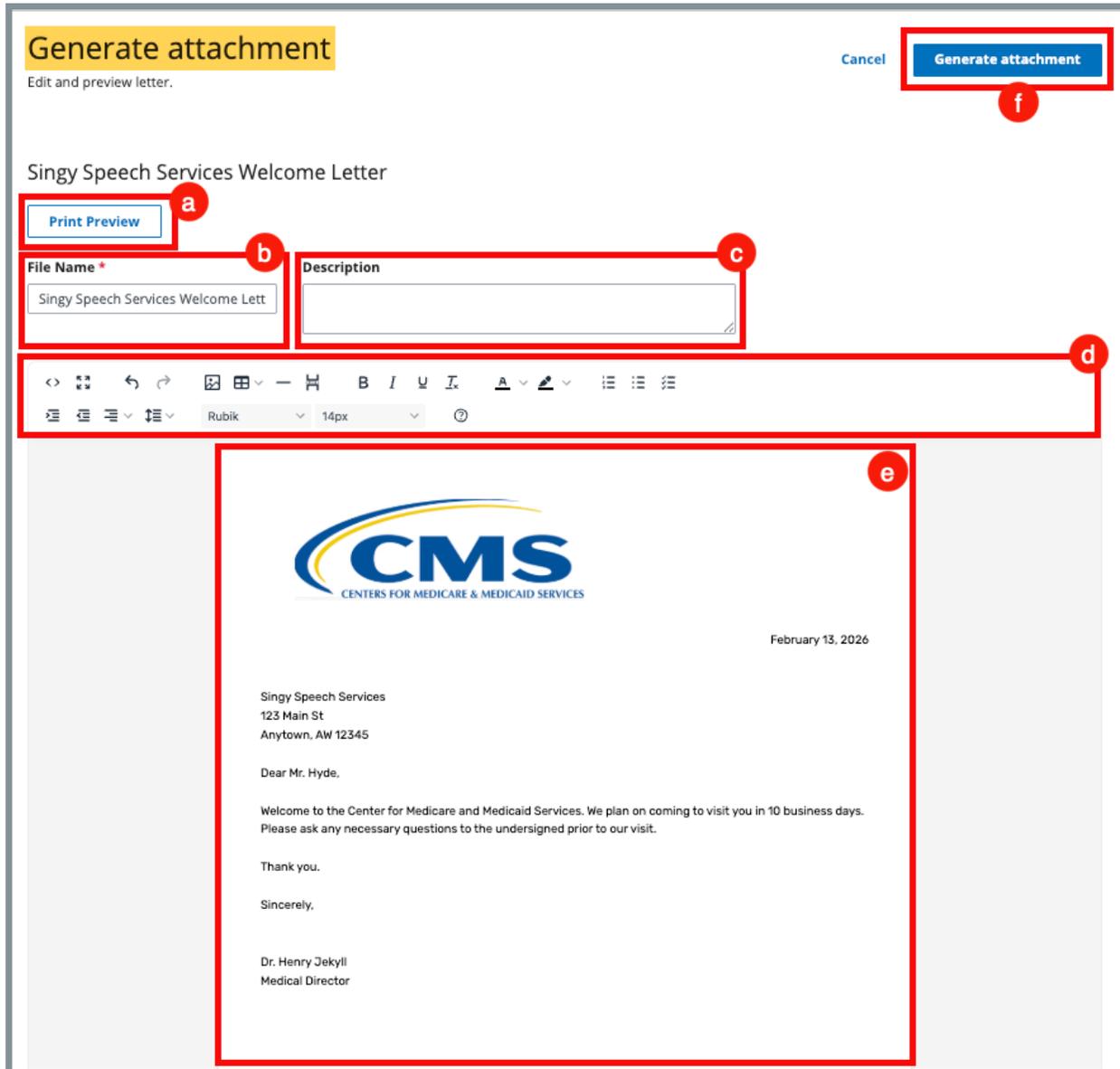


Figure 13: Letter Template

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 <i>Unsubstantiated Claim</i> 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.

Attachments

[Upload Attachment](#) [Generate from template](#)

1 Letter Attachment

File Name	Date Uploaded	Last Modified	Description	Actions
Singy Speech Services Welcome Letter	02/16/2026 2:16 PM	02/16/2026 2:16 PM by Pat NH_CMSGU_Singy	No information	Actions

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.

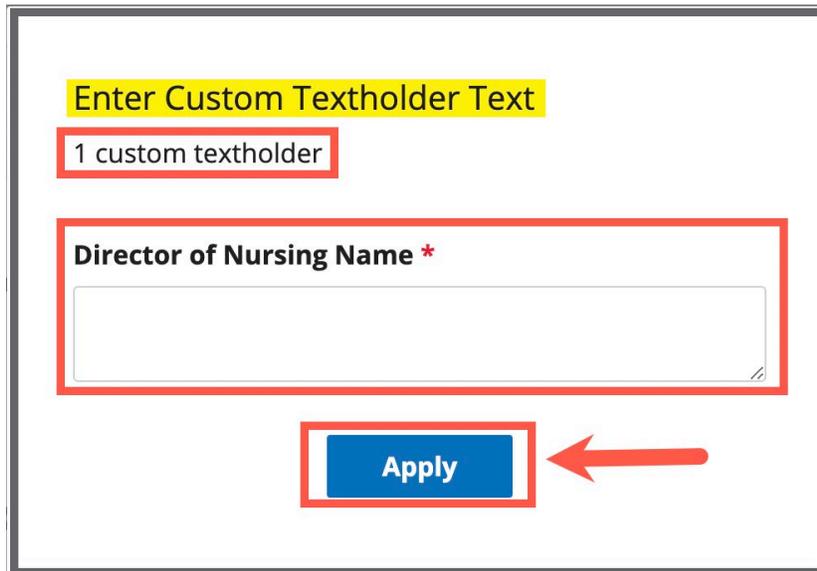
3.3.3 Continue with [step 3.2.10](#) to update the template, if needed.

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.



The screenshot shows a pop-up window titled "Enter Custom Textholder Text". Below the title, there is a text input field containing "1 custom textholder". Below that, there is a larger text input field labeled "Director of Nursing Name *". At the bottom center of the window is a blue button labeled "Apply". A red arrow points from the right side of the "Apply" button towards the left.

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*.

Add Recipient
All fields are optional. Complete at least one field to save.

Name Primary Recipient

Address 1 Address 2

City State ZIP Code

Email

Letter Information

Date Sent

Sender

Method

Tracking ID

Receipt acknowledged

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.

< Return to Letter

Recipient Information

Recipient Name Frank N. Stein	Recipient Email ingelstadt@frankscastle.com
Recipient Address 123 Main St Nowhereville, FL 89890	
Letter Information	
Date Sent 06/30/2025	Method Email
Sender Name Surveyor Sam	Tracking ID B12345
Receipt Acknowledged No	

Edit

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*.

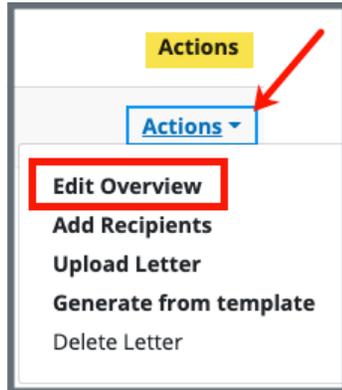


Figure 19: Edit a Letter Overview

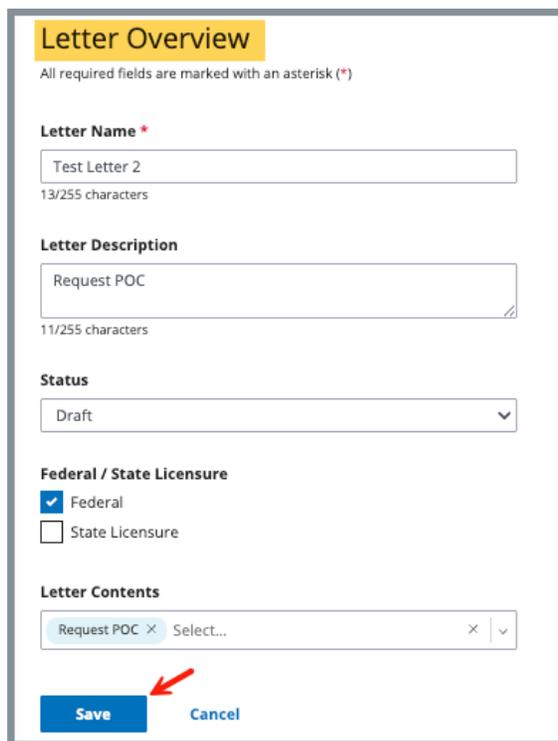


Figure 20: Edit Letter Overview

3.6.2 Update fields.

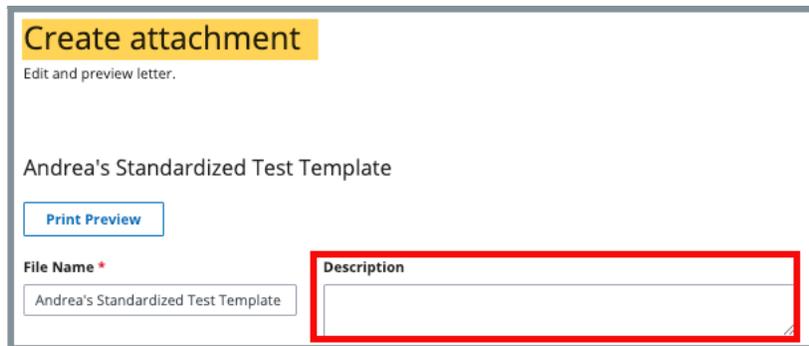
3.6.3 Click **Save**.

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*.



The screenshot shows a web interface titled "Create attachment" in a yellow header. Below the header, it says "Edit and preview letter." The main content area displays "Andrea's Standardized Test Template" and a "Print Preview" button. At the bottom, there are two input fields: "File Name" with a red asterisk and a text box containing "Andrea's Standardized Test Template", and "Description" with a red border around its empty text box.

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*.

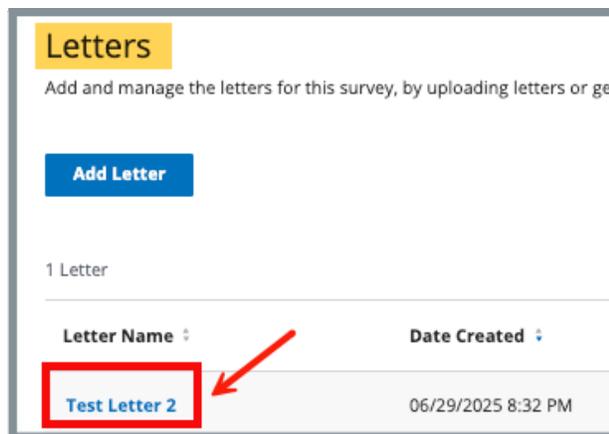


Figure 22: Click Letter Name

[Return to Letters](#)

Letter: Test Letter 2 [Edit](#)

Overview

Description	Request POC
Status	Draft
Federal/State Licensure	Federal
Letter Contents	Request POC
Date Created	06/29/2025 8:32 PM

Attachments

[Upload Attachment](#) [Generate from template](#)

1 Letter Attachment

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

Recipients

[Add Recipient](#)

1 Recipient

Recipient Name	Date Sent	Sender	Actions
Frank N. Stein Primary	06/29/2025	No information	View Edit Delete

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.

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 - Delete Edit Finalize

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.

Edit attachment
 Edit and preview letter.

Cancel Save

Print Preview

File Name * Description

Andrea's Survey Template

Rubik 14px

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

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.

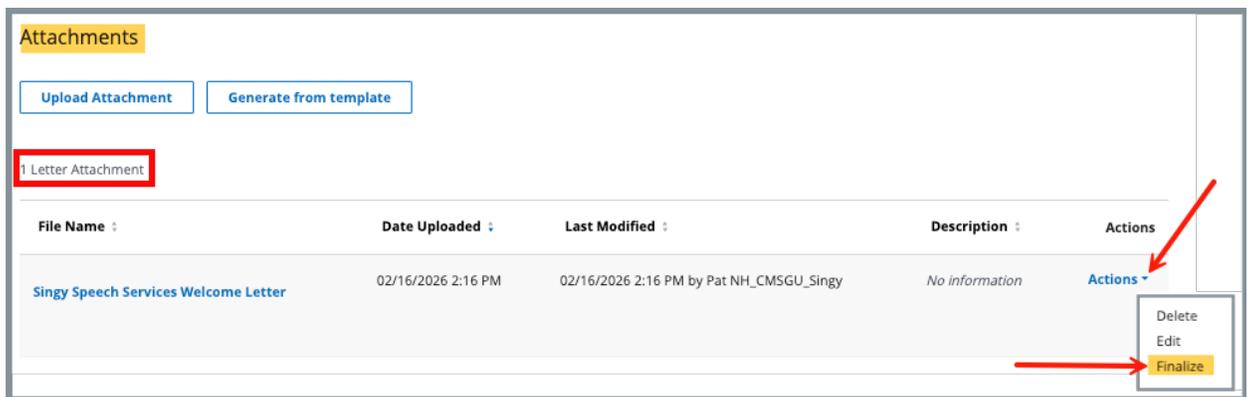


Figure 26: Finalize Letter

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

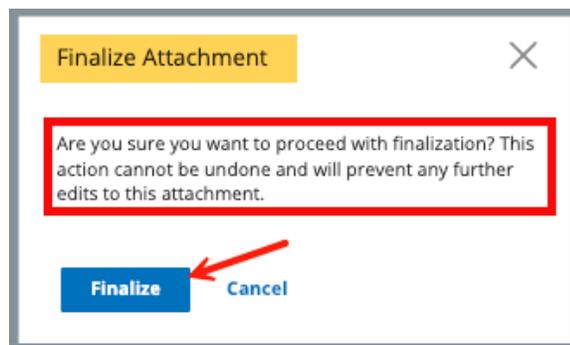


Figure 27: Finalize Letter Pop-Up Window

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

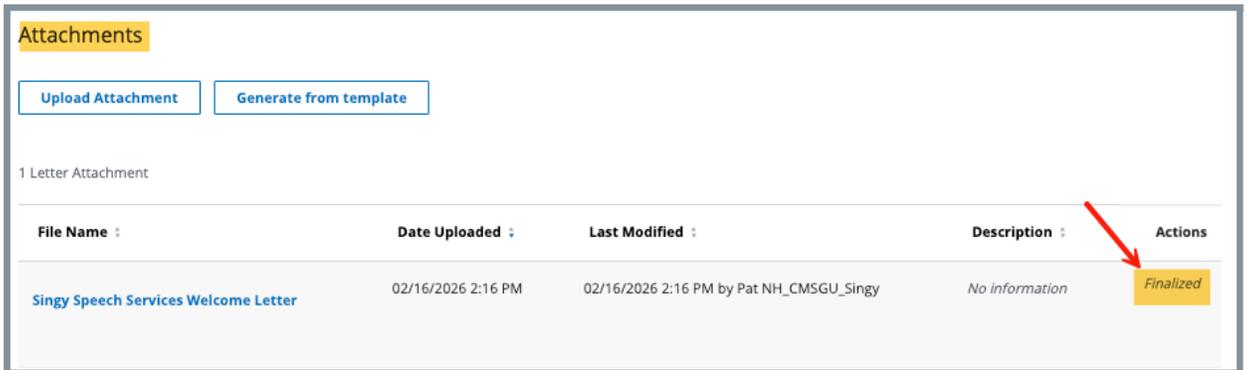


Figure 28: Finalized

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*.

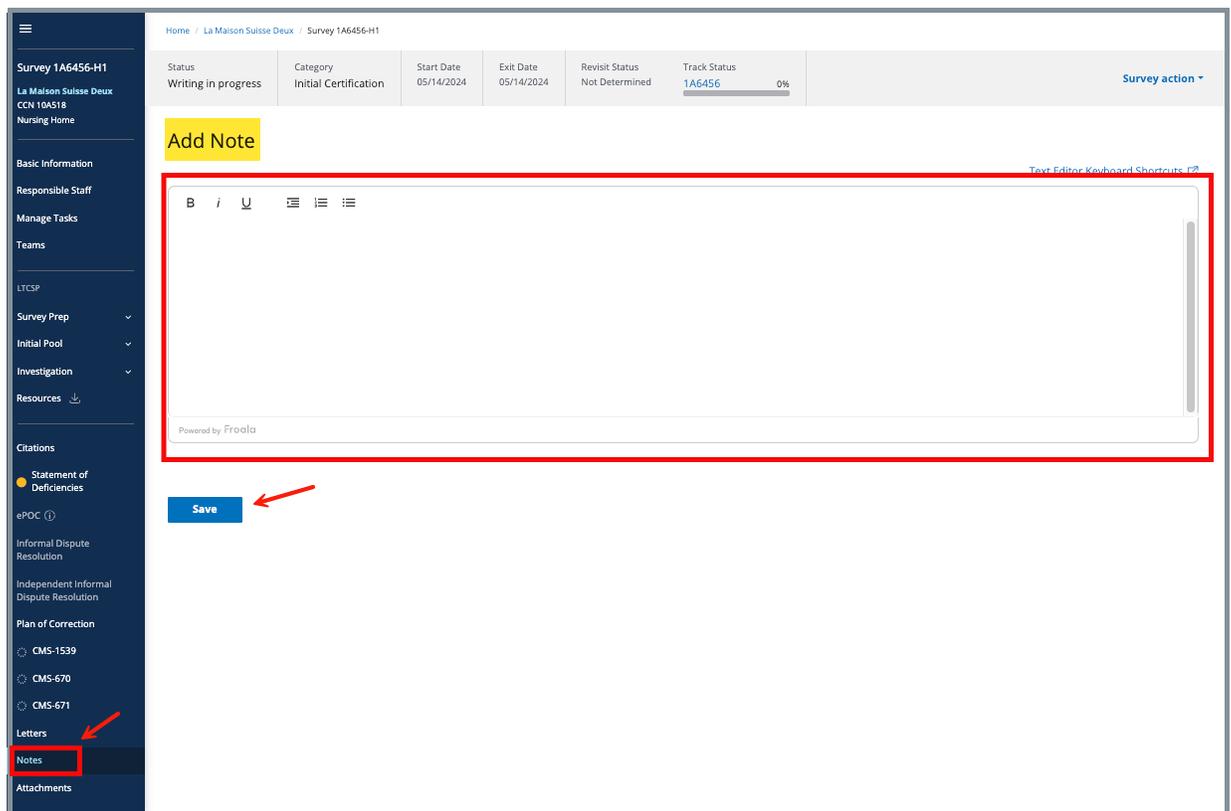


Figure 30: Add Note

4.2 Type notes in blank field.

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

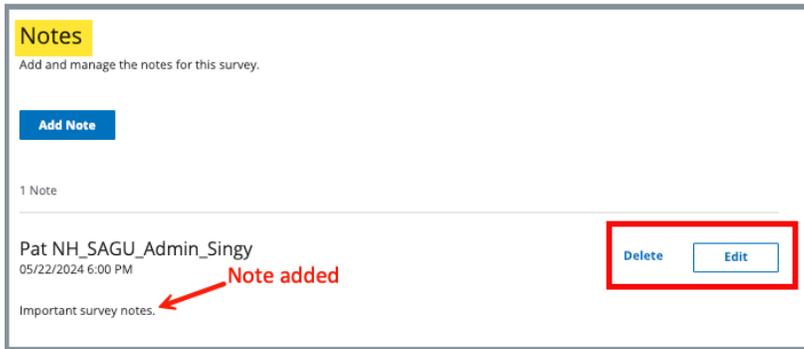


Figure 31: Notes

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*.

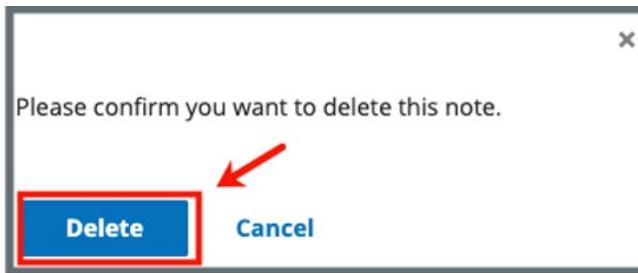


Figure 32: Delete Note Pop-Up Window

- 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*.

Home / La Maison Suisse Deux / Survey 1A6456-H1

Status	Category	Start Date	Exit Date	Revisit Status	Track Status	Survey action
Writing in progress	Initial Certification	05/14/2024	05/14/2024	Not Determined	1A6456 0%	

Attachments

Add attachments for this survey and add a file description below.

[Select File](#)

Supported file formats PDF (.pdf), Word (.doc, .docx), Excel (.xls, .xlsx, .csv), Text files (.txt, .rtf), Image files (.jpeg, .jpg, .png, .tif, .tiff), Video files (.mp4, .mov, .wmv, .3gp), Audio files (.mp3, .aac, .wav, .wma), and Message files (.msg, .eml).

Special Characters Allowed, all unsupported characters will be replaced with a "*" \$ < > . % & " ' () , + - _ ? ! @ # ^ = []

Attachment Name

CMSlogrebr2colCMYkplain.tif [Remove](#)

File Description

Optional: Type file description in blank field

0/255 characters

[Save](#)

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*.

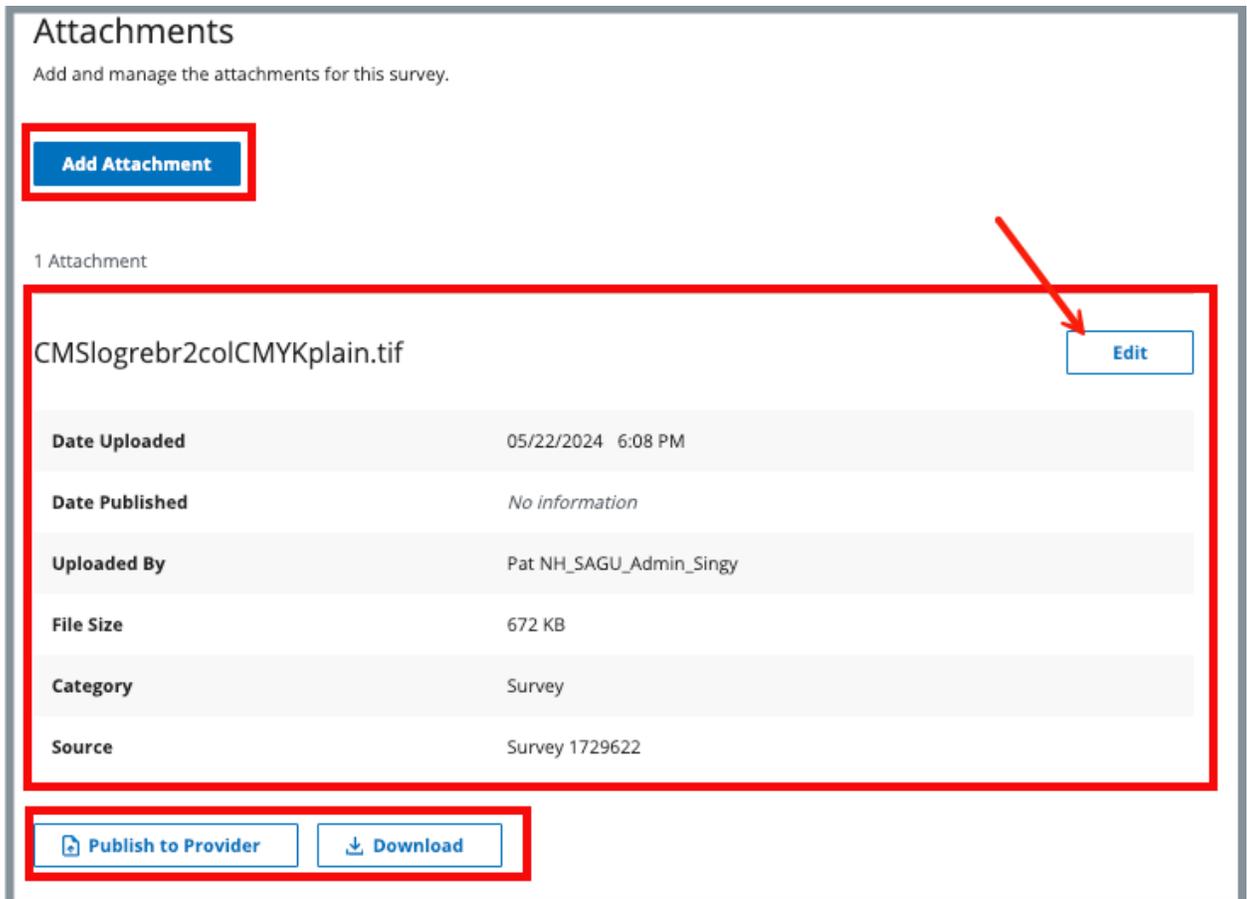


Figure 34: Attachment

- 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.

1 Attachment

CMSlogrebr2colCMYKplain.tif

Date Uploaded	05/22/2024 6:08 PM
Date Published	05/22/2024 6:24 PM
Uploaded By	Pat NH_SAGU_Admin_Singy
File Size	672 KB
Category	Survey
Source	Survey 1729622

✕ Unpublish to Provider
↓ Download

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

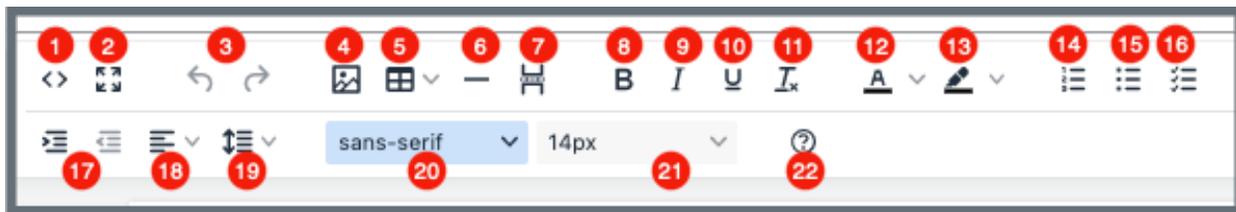


Figure 36: Letter Template Format Menu

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