



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Survey and Certification (S&C) Manage a Provider User Manual

**Version 2.1
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1. Introduction

This user manual addresses the processes necessary to perform Survey & Certification (S&C) Provider functions in iQIES.

For information on other modules, refer to [Reference & Manuals](#) on QTSO.

1.1 Getting Started in S&C – Important Information to Know

Below is important general information about iQIES.

- Log in to iQIES at <https://iqies.cms.gov/> with Health Care Quality Information Systems (HCQIS) Access Roles and Profile ([HARP](#)) login credentials. Refer to the [iQIES Onboarding Guide](#) for further information, if necessary.
- All screenshots included in this manual contain only test data. Current screens in iQIES may differ from what is shown in screenshots below.
- Screenshots are dependent on user role and may not be an exact representation.
- Words highlighted in blue are clickable links.
- A red asterisk (*) indicates a required field.
- Blank fields may have a limited number of characters allowed in that field. If so, the character limit is shown on the bottom left. The blank fields may also be expanded. Click the two 45° parallel lines and drag to the right to enlarge the box. See *Figure 1, Expandable Field*.

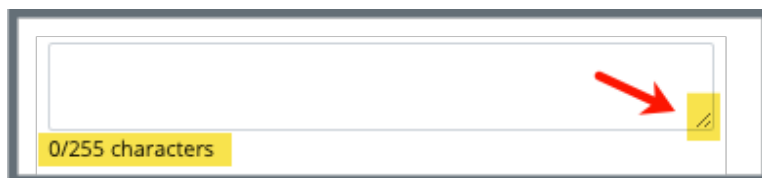


Figure 1: Expandable Field

- iQIES times out after 30 minutes of nonuse and reverts to the login page.
 - iQIES remains up and active as long as it is in use.
 - iQIES gives a five-minute warning before timing out.
 - The session resumes at the last accessed page after reauthentication.
 - Be sure to save data regularly. Pages that require saving are noted in this document, and have a **Save** button on the page.
- iQIES uses a smart search. Once three letters/digits are typed in the search bar, results are shown based on the letters/digits entered. The more letters/digits entered, the narrower the search. If any of the results is the correct result, click the result to open.
- Review any notification banners. Some banners may have links to review further information; others may be a reminder of a task that must be completed. See *Figure 2, Notification Banner* and *Table 1, Notification Banner Color Descriptions*. These banners can be closed (X'd out) at any time.

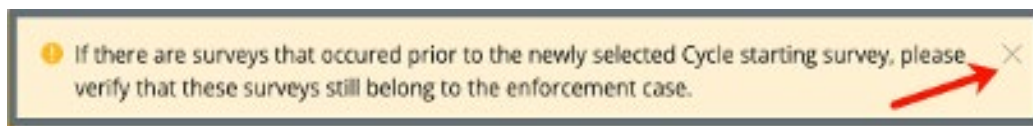


Figure 2: Notification Banner

Table 1: Notification Banner Color Descriptions

Notification Banner Color	Reason
Green	Action was successful
Blue	Informational only
Yellow	Warning. Review for information.
Red	Stop and review. The banner explains the actions must be taken.

- Review any Tool Tips for additional information to perform an action. Hover over the information icon to see the tip. Tool Tips are in iQIES to communicate information. Look for the information icon. See *Figure 3, Tool Tip Icon*.

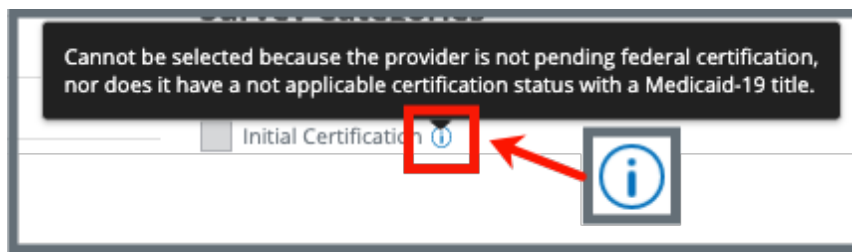


Figure 3: Tool Tip Icon

- 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:
https://cmsqualitysupport.servicenowservices.com/ccsq_support_central

Idea Portal: Feedback for future iQIES software development: [CCSQ Support Central](#). Click **Idea Portals** and select **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 require a State Agency or Centers for Medicare & Medicaid Services (CMS) role with the capability to view or edit this information.

Permissions are ultimately governed by HARP access privileges. Contact the SO for your organization or the iQIES Service Center for issues relating to access and permissions. Refer to the [iQIES User Roles Matrix](#) for detailed information on roles.

For additional help, refer to <https://iqies.cms.gov/iqies/help> or click the help icon in the top right corner of the screen, see *Figure 4, Help Icon*, for further information.



Figure 4: Help Icon

1.4 My Tasks Landing Page

Purpose: **My Tasks** Landing Page is a tool used to track and display data for individual users. It consolidates information and processes into one area so that the user can see at a glance what actions must be performed.

1.4.1 Log in to iQIES. The landing page displays the **My Tasks** tool. See *Figure 5, My Tasks Landing Page and Table 2, My Tasks Landing Page Detailed Callout*.

Note: The **My Tasks** landing page defaults to **Active tasks**. Click the drop-down menu and select **Closed tasks** to view completed tasks.

Welcome, Pat

My Tasks

Providers Surveys Intakes Enforcements

My Providers Tasks

Expand All Tasks Active tasks

Provider	ID	Provider Type	Certification Status	Assigned Tasks
House of the Rising Sun 1 Main St. Anytown, Florida 87960	FACID IQ00000002521599 Enable Offline	HHA	Pending Certification	Licensure Review
ASSIGNED TASK DUE DATE TASK STATUS COMMENTS Licensure Review 07/18/2025 To Do				
House of the Rising Sun3 1 Main St. #305 Anytown, Florida 87960	CCN 69K394 FACID IQ00000002521587 Enable Offline	HHA	Certified	Provider Maintenance, Licensure Review, Scheduling, Branch Approver
ASSIGNED TASK DUE DATE TASK STATUS COMMENTS Branch Approver 07/11/2025 To Do Licensure Review 07/16/2025 To Do Provider Maintenance 07/17/2025 To Do Scheduling No information To Do				

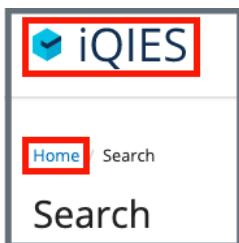
Figure 5: My Tasks Landing Page

Table 2: My Tasks Landing Page Detailed Callout

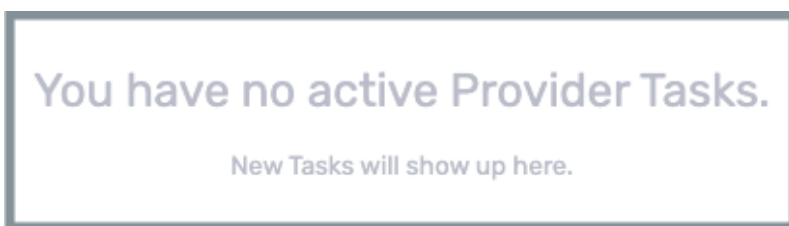
No.	Name	Description
a	Providers tab	Click each tab (Providers, Surveys, Intakes, Enforcements) to review the respective tasks. Not all tabs are available in all user roles. Click Enable Offline to enable the survey offline. For more details on how to enable offline, refer to S&C User Manual: Offline .
b	Expand All Tasks	This checkbox defaults to checked so users can see tasks assigned to them. Uncheck box to close task detail.
c	Provider	The provider address shows as a link directly under Provider . Click the link to go directly to the Provider Basic Information page.
d	ID	The provider CCN and FACID are shown. Click Enable Offline to enable the survey offline. For more details on how to enable offline, refer to S&C User Manual: Offline .
e	Provider Type	Shows the provider type (ASC, HHA, Hospice, Nursing Homes).
f	Certification Status	Shows certification status of the provider.
g	Assigned Tasks	Lists the assigned tasks.
h	Active/Closed Tasks	Toggle between Active and Closed tasks.
i	New	A blue New in an oval shape (badge) next to the Survey ID in the Survey tab indicates that the survey task's status is New .
j	COMMENTS	Add or review a comment. See Comments for details.

Notes:

- Click the iQIES logo on the top left of the screen or **Home** to return to the **My Tasks** landing page at any time. See *Figure 6, iQIES Logo*.

*Figure 6: iQIES Logo*

- If there are no tasks, then a message appears below the selected tab. See *Figure 7, No Active Tasks*, for an example from the **Providers** tab.

*Figure 7: No Active Tasks*

1.4.2 Task Detail: Tasks are shown by default. See *Figure 8, Task Status Details* and *Table 3, Task Status Details Detailed Callout*.




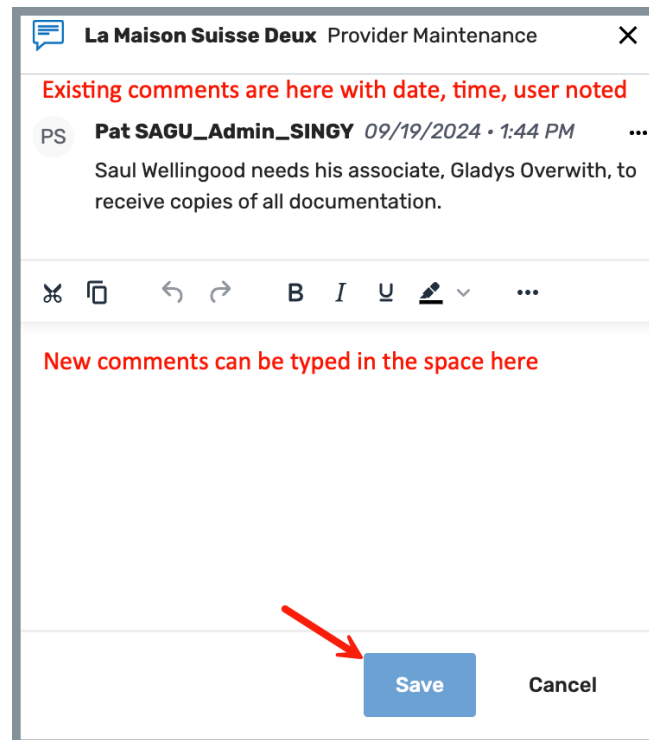
 La Maison Suisse Deux 123 Main St Anytown, Florida 88990		CCN 10A518 FACID IQ00000004235034 Enable Offline	NH	Certified
a	b	c	d	
ASSIGNED TASK ▾	DUE DATE ▾	TASK STATUS ▾	COMMENTS ▾	
Branch Approver	09/26/2024	To Do ▾	No comment 	
Provider Maintenance	09/26/2024	To Do ▾	Existing comment 	

Figure 8: Task Status Details

Table 3: Task Status Details Detailed Callout

No.	Name	Description
a	ASSIGNED TASK	The name of the task assigned.
b	DUE DATE	The date the task is due, if available.
c	TASK STATUS	The task status. Task statuses are: To Do, In Progress, Complete.
d	COMMENTS	Comments. A + (plus sign) indicates a comment has not been left. See step 1.4.3 .

1.4.3 Click the **+** to leave a comment. The side menu opens. See *Figure 9, My Tasks Comments*.

**Figure 9: My Tasks Comments**

1.4.4 Click **Save** to save comments. The side menu closes.

2. Manage a Provider Overview

A provider is any organization, institution, or individual that provides health care services to Medicare beneficiaries. Physicians, ambulatory surgical centers, and outpatient clinics are some of the providers of services covered under Medicare Part B.

This manual explains how to search, add, approve, or reject a provider, view and download reports, add buildings, multiple locations, branch addresses, operating details, additional contacts and explains certification and licensure and deeming information for Home Health Agencies (HHA), Ambulatory Surgical Centers (ASC), and Hospice provider types.

Contact the [iQIES Service Center](#) to delete a provider.

3. Search for a Provider

3.1 Go to **Survey & Certification** at the top of the iQIES home page. Click the arrow to open the drop-down menu.

3.2 Click **Search**. The **Search** screen opens. See *Figure 10, S&C Search*.

Note: The Providers tab is the default landing tab.

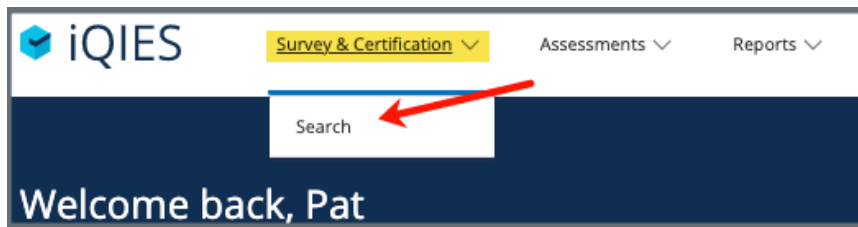


Figure 10: S&C Search

3.3 Select **Provider** or **DBA** (Doing Business As), **CCN** (CMS Certification Number) or **State Facility ID** (FACID) from the drop-down menu under **Search for Surveys**. See *Figure 11, Search*

Search

Providers Surveys Intakes

Search for Providers

Provider or DBA

> [Show Advanced Search](#)

Search Reset

✓ Provider or DBA
CCN
State Facility ID

Figure 11: Search

3.4 Type search criteria.

3.5 Click **Search**. The provider information shows below. See *Figure 12, Provider Search Results*.

Note: Click **Show Advanced Search** for a more detailed search. Refer to step 3.7 for details.

Search

Providers Surveys Intakes Enforcements CMPTS Cases

Search for Providers

Provider or DBA

> [Show Advanced Search](#)

Search Reset

1 - 10 of 44 Providers

Provider	ID	Operating Status	Provider Type	Certification Status	Deemed Status
House of the Rising Sun 1 Main St, Anytown, VA 24501	CCN 49K002 FACID IQ00000002489565	● Open	HHA	Certified Medicaid - 19	Non-Deemed
House of the Rising Sun 1 Main St, Anytown, FL 87960	FACID IQ00000002521599	● Open	HHA	Pending Certification	Non-Deemed

Figure 12: Provider Search Results

- 3.6 Click desired provider name under **Provider**. The **Provider History** window opens with a list of provider forms, surveys, intakes, and enforcements related to the provider. See *Figure 13, Provider History Page*.

Provider History
For more information on the deficiency history of a provider, view the provider history report.

[View Provider History Report](#)
[View All Provider Reports](#)

Provider Forms
[Add Form](#)

Form Name	Status	Related Survey(s)	Created Date	Last Updated	Track ID	Actions
CMS-1539	Complete	E0DA1-H1	03/29/2023	01/31/2024	E0DA1 100%	Form action
CMS-1572	Complete	E0DA1-H1	01/31/2024	01/31/2024	E0DA1 100%	Form action
CMS-1572	Complete	15A11A-H1	08/29/2023	01/31/2024	15A11A 0%	Form action

[View All Forms \(18\)](#)

Recent Surveys
[Add Survey](#)

Sets & Survey ID	Survey Type	Survey Category	Exit Date	Status	Track ID	Actions
12B715-H1	Health	Validation Survey		Writing in progress	12B715 0%	
12B714-H1	Health	Recertification, Complaint		Writing in progress	12B714 0%	
115866-H1	Health	Recertification, Complaint		Writing in progress	115866 0%	

[View All Surveys \(25\)](#)

Recent Intakes
[Add Intake](#)

Intake ID	Status	Priority	Allegations	Intake Start Date	Survey Due Date	Actions
Complaint 732400	Pending Finalization	Immediate Jeopardy	1	08/08/2023	No information	View
Complaint 726374	Triage/Prioritization	Immediate Jeopardy	1	08/01/2023	No information	View
Complaint 726352	Triage/Prioritization	Immediate Jeopardy	2	08/01/2023	No information	View

[View All Intakes \(25\)](#)

Recent Enforcements
[Add Enforcement](#)

Case ID	Case Type	Cycle Start Date	Starting Survey	Status	Actions
453785-F	Federal	10/04/2023	1538C1-H1 (10/04/2023)	Open - CMP Collection	View
240992-F	Federal	03/17/2022	D4547-H1 (01/05/2022)	Open	View

Figure 13: Provider History Page

Notes:

- Click **Add [Form/Survey/Intake/Enforcement]** to add a form, survey, intake, or enforcement directly from the Provider History page.
- Click **View All [Forms, Surveys, Intakes, Enforcements] [#]** at the bottom right of each list to view all the forms, surveys, intakes, or enforcements associated with the provider. The number next to **View All** is the total number of forms, surveys, intakes, or enforcements associated with the provider.

3.7 Click **Show Advanced Search**, if desired, to open the Advanced Search drop-down menu and narrow the search criteria. See *Figure 14, Provider Advanced Search*.

Figure 14: Provider Advanced Search

3.8 Type in desired detailed criteria. Click **Search**. The provider information shows below.

Note: Click **Hide Advanced Search** to close the **Advanced Search** menu.

4. Certification Event

Purpose: To organize certification documents for provider certification.

Note: It may be necessary to refresh the page to update track status when changes are made.

[View Certification Progress in Workload Management](#)

[View Certification Progress in Survey](#)

[View Certification Progress in Provider History Page](#)

4.1 View Certification Progress in Workload Management

4.1.1 Go to the iQIES home page.

4.1.2 Click the **Survey** tab.

4.1.3 View certification status under **Track Status** for each survey in Workload Management.

4.1.4 Click survey number to view details. See *Figure 15, Workload Management Track Status*.

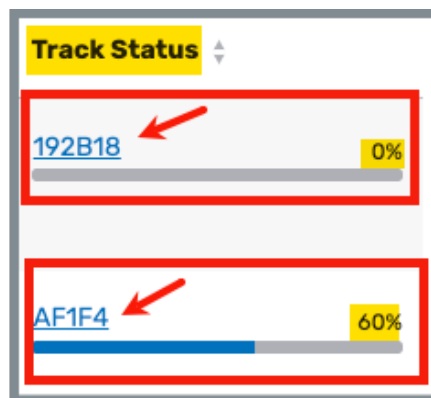


Figure 15: Workload Management Track Status

4.1.5 Click the survey number to view detailed certification status. The track status for the selected survey opens.

4.1.6 Click the carets next to the survey number or **Track Forms** to view additional details. See *Figure 16, Detailed Certification Status*.

The screenshot shows a window titled "Track AF1F4 Status" with a close button (X) in the top right corner. The window contains two expandable sections, each with a caret icon and a red arrow pointing to it. The first section is "Survey AF1F4-H1" and the second is "Track Forms". Both sections contain a table with three columns: "Name", "Status", and "Completed Date".

Name	Status	Completed Date
CMS-670	Complete	-
CMS-2567	Complete	04/30/2021
Closed Status	In Progress	-

Name	Status	Completed Date
CMS-1539	Not Started	-
CMS-1572	Complete	11/02/2022

At the bottom right of the window is a blue "Close" button with a red arrow pointing to it.

Figure 16: Detailed Certification Status

4.2 View Certification Progress in Survey

Go to the **Survey Basic Information** page. See *Figure 17, Survey Basic Information Page Certification Progress* and *Table 4, Basic Information Page Certification Progress Callout Details*.

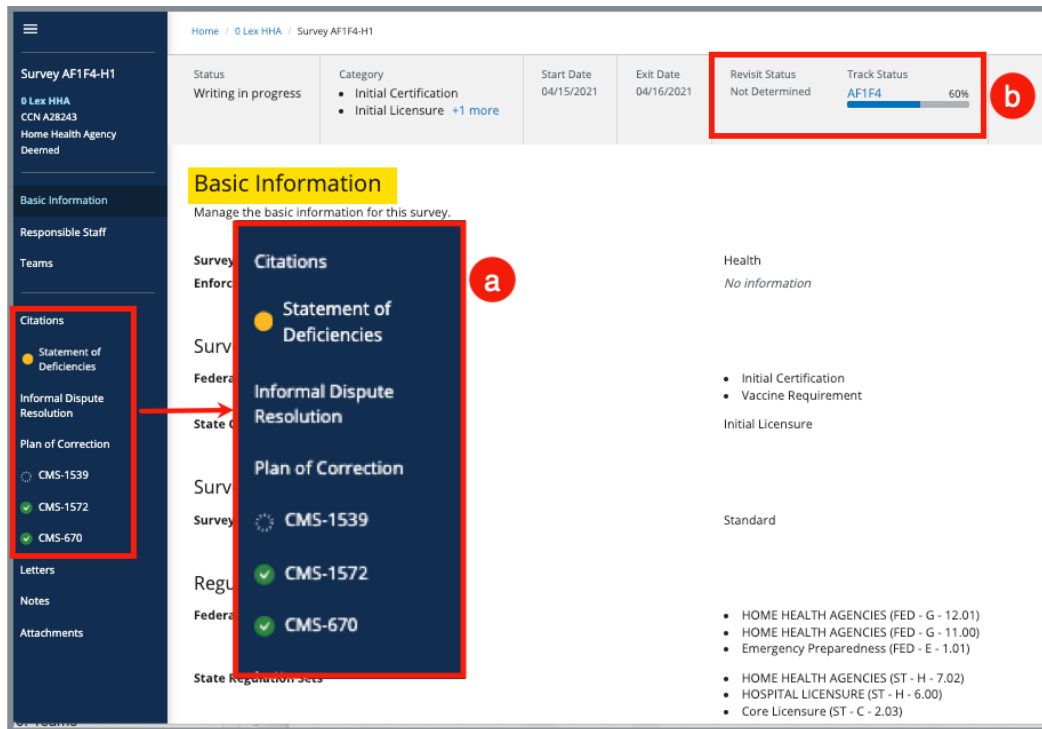


Figure 17: Survey Basic Information Page Certification Progress

Table 4: Survey Basic Information Page Certification Progress Callout Details

Callout	Action	
a	The left menu shows the status at a glance.	
	No fill	Not Started: Form or information hasn't been started
	Yellow fill	In Progress: Form or information has been started, but it is incomplete
	Green fill	Complete: Form or information is complete
b	The grey status bar shows the certification track status. Click survey number under Track Status to see detailed information on certification status. See step 4.1.6 for further details.	

4.3 View Certification Progress on Provider History Page

4.3.1 Go to the **Provider History** page. See *Figure 18, Provider History Page Certification Progress*.

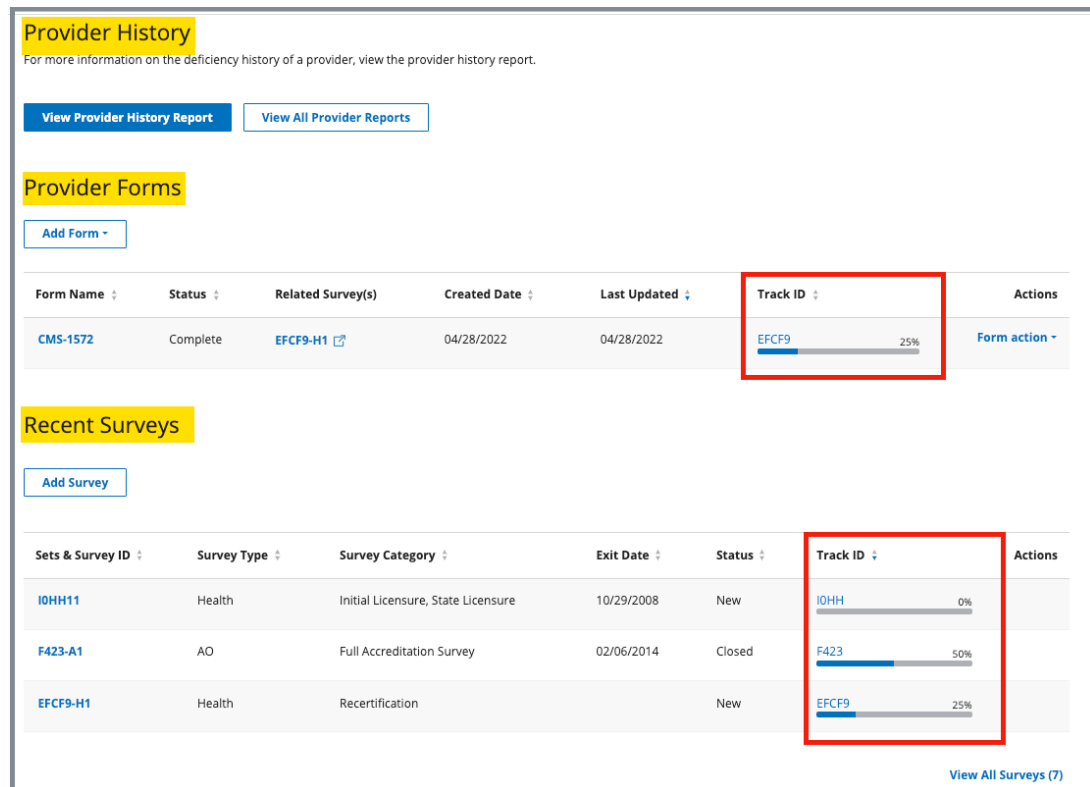


Figure 18: Provider History Page Certification Progress

4.3.2 Click survey number under **Track ID** to see detailed information on certification status. [See step 4.1.6](#) for further details.

5. View Provider Details

Click **View Details** on the **Provider History** page. The **Basic Information** page opens. See *Figure 19, View Details Link*.

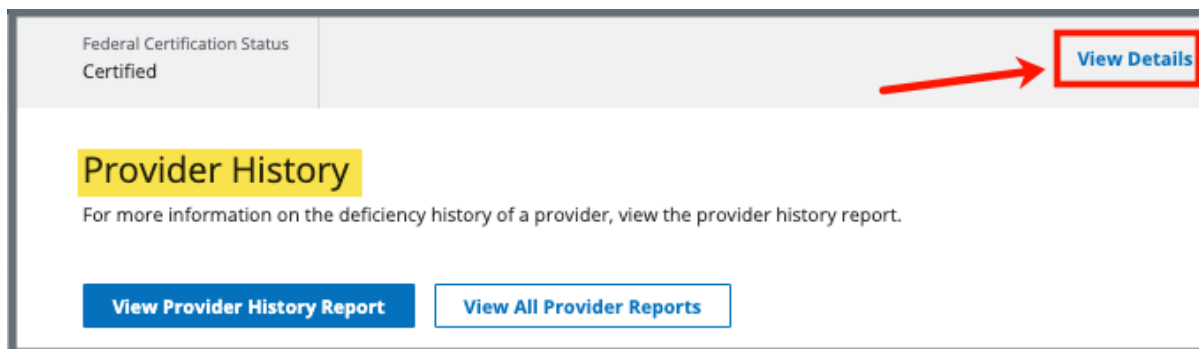


Figure 19: View Details Link

- 5.1 Click any selection on the left menu (e.g., **Mailing Address, Letters**) to go to a different page in iQIES and view further provider information. See *Figure 20, Provider Basic Information Page*.

Note: The left menu varies by provider type. The figure below shows the left menu for an HHA provider. these are the provider attributes that are provider specific:

HHA:	<u>Additional Branch Addresses</u>
ASC:	<u>Locations</u>
Hospice:	<u>Inpatient Locations</u> <u>Multiple Locations</u>
Nursing Homes	<u>Buildings/Wings</u> <u>Performance</u> <u>Bed Summaries</u>

- 5.2 Click **Return to Provider** to return to the **Provider History** page.

Home / House of the Rising Sun54 / Provider Details

Federal Certification Status	Title
Certified	Medicare - 18

Basic Information

Manage the basic information for this provider. [Edit](#)

Overview

Provider Name	House Of The Rising Sun54
Provider Type	HHA
Provider Subtype	N/A
Address	1 Main St Anytown, FL 87960
Phone	4345551212
Phone EXT	No information
Fax	No information
Email	jeannevaljean@fake.com
Website	No information
County	No information
CMS Location	4 - Atlanta
State Region	No information
Management Unit	No information
Work Unit	No information

Figure 20: Provider Basic Information Page

6. Add a Provider

New providers are automatically set to **Pending Certification** status.

Review information in the [Certification and Licensure](#) section to certify a new provider, if necessary.

- 6.1 Click **Add a Provider** from the **Survey & Certification** drop-down menu to add a new provider. See *Figure 21, Add a Provider*. The **Add a Provider** window opens.

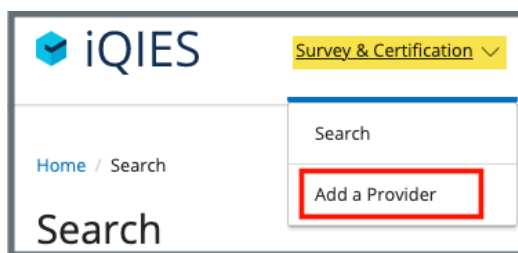


Figure 21: Add a Provider

- 6.2 Fill out the information. See *Figure 22, Add a Provider Basic Information*.

Notes:

- Greyed out areas cannot be filled out. They are disabled based on the provider's information.
- Check **Same as Legal Business Name** to automatically populate **Doing Business as Name** if both names are the same.
- **Address 1** must be a locatable address. Use **Address 2** for additional details, if necessary. For questions about a locatable address, go to the [USPS ZIP Code locator](#) and enter **Street Address**, **City**, and **State** and click **Find**. A new window opens with the locatable address.
- **Address 2** can be a PO Box, but a provider that has a PO Box cannot be a practice location.

- 6.3 Click **Add Provider** to add the provider. The new **Provider History** page opens and can be viewed and edited.

Notes:

- An iQIES ID is automatically generated.
- New surveys and intakes can now be added.

Add a Provider

Basic Information
All required fields are marked with an asterisk (*)

Legal Business Name *

The provider name that is registered with the IRS and the Legal Business Name reported on the CMS 855

☐ Same as Legal Business Name

Doing Business As Name *

The name under which the provider operates and the Doing Business As Name reported on the CMS 855

Provider Type * **Provider Subtype**
Select one

Primary Practice Location

Address 1 * **Address 2**

City * **State *** **ZIP Code ***
 Select one

County

Add Provider [Cancel](#)

Figure 22: Add a Provider Basic Information

7. Inpatient Care Provided

Purpose: To identify whether the Hospice provides care in an inpatient setting.

Note: Inpatient Care Provided is enabled for Hospice provider type only.

- 7.1 Click **Edit** on the **Provider Basic Information** page. See *Figure 23, Hospice Provider Details Edit Page*. The **Basic Information** edit page opens.

Basic Information

Manage the basic information for this provider.

Edit

Overview

Provider Name	Hill House Hospice
Provider Type	Hospice

Figure 23: Hospice Provider Details Edit Page

- 7.2 Click the **Yes** or **No** radio button under **Inpatient Care Provided**. See *Figure 24, Inpatient Care Provided Radio Buttons*.

Note: Click **Yes** to enable the [Inpatient Locations](#) selection on the left menu.

Basic Information

All required fields are marked with an asterisk (*)

Legal Business Name *

Hill House Hospice

The provider name that is registered with the IRS and the Legal Business Name reported on the CMS 855

☒ Same as Legal Business Name

Doing Business As Name

Hill House Hospice

The name under which the provider operates and the Doing Business As Name reported on the CMS 855

Provider Type * **Provider Subtype**

Hospice

Inpatient Care Provided *

☒ Yes

☐ No

Figure 24: Inpatient Care Provided Radio Buttons

- 7.3 Click **Save**.

8. Inpatient Locations

Purpose: To add locations and buildings for Life Safety Code surveys.

Notes:

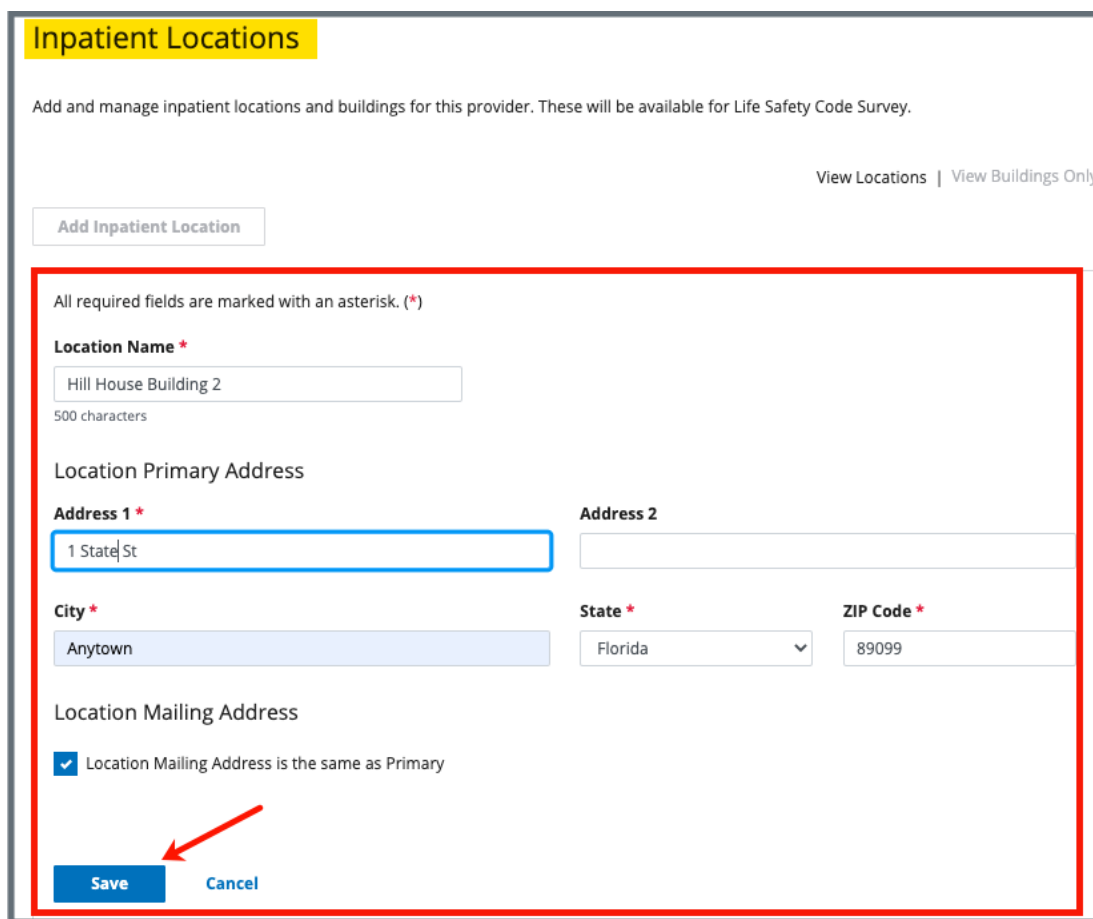
- Inpatient Locations is enabled for Hospice provider type only.
- [Inpatient Care Provided](#) must be answered **Yes** to view **Inpatient Locations**.

8.1 Click **Inpatient Locations** on the left menu. See *Figure 25, Inpatient Locations*. The **Inpatient Locations** page opens.

The screenshot shows the 'Inpatient Locations' page. On the left, a dark blue sidebar contains a list of menu items: 'Non-Deemed', 'Return to Provider', 'Basic Information', 'Responsible Staff', 'Inpatient Locations' (highlighted with a red arrow), 'Mailing Address', 'Multiple Locations', 'Operating Details', 'Additional Contacts', 'Certification', 'Licensure', 'Deeming Information', 'Administrators', 'Letters', 'Notes', and 'Attachments'. The main content area has a yellow header 'Inpatient Locations' and a subtitle 'Add and manage inpatient locations and buildings for this provider. These will be available for Life Safety Code Survey.' Below this is a red-bordered button labeled 'Add Inpatient Location'. The main area displays a list of buildings, including 'Hill House Building 2' and 'The Andrea Building'. Each building entry has 'Delete' and 'Edit' links. The 'The Andrea Building' entry shows details like '02 | Building | Active | Federal | No effective date'.

Figure 25: Inpatient Locations

8.2 Click **Add Inpatient Location**. The **Inpatient Location** fields open below. See *Figure 26, Inpatient Locations Fields*.



Inpatient Locations

Add and manage inpatient locations and buildings for this provider. These will be available for Life Safety Code Survey.

[View Locations](#) | [View Buildings Only](#)

[Add Inpatient Location](#)

All required fields are marked with an asterisk. (*)

Location Name *

Hill House Building 2

500 characters

Location Primary Address

Address 1 *

1 State St

Address 2

City *

Anytown

State *

Florida

ZIP Code *

89099

Location Mailing Address

☒ Location Mailing Address is the same as Primary

Save [Cancel](#)

Figure 26: Inpatient Locations Fields

- 8.3 Fill out the information.
- 8.4 Click **Save**. The **Inpatient Locations** page populates with the new location. See *Figure 27, Inpatient Locations Information*.

Inpatient Locations

Add and manage inpatient locations and buildings for this provider. These will be available for Life Safety Code Survey.

Toggle between Locations and Buildings → [View Locations](#) | [View Buildings Only](#)

[Add Inpatient Location](#)

Hill House Building 2 [Edit](#)

No Buildings

Address

1 State St
Anytown, FL 89099

Buildings [Add Building](#)

No buildings
Your buildings will show up here.

Figure 27: Inpatient Locations Information

Note: Toggle between **View Location** and **View Buildings** to see each view. **View Location** shows the address of the building. **View Buildings** shows information about the buildings.

In the example above, **View Buildings Only** is in blue, so the buildings are what is shown.

A building must be added to create an LSC survey.

- 8.5 Click **Add Building** to add a building. The **Buildings** fields open below. See *Figure 28, Inpatient Locations Building*.

Hill House Building 2

No Buildings

Edit

Address

1 State St
Anytown, FL 89099

Buildings

Add Building

All required fields are marked with an asterisk. (*)

Parent Location

Hill House Building 2

Building Name *

The Andrea Building

500 characters

Building Licensure

☐ State Licensed Only

Building ID *

02

Limit 2 characters

Type *

Building

Number of Stories

Plan Approval Date

MM/DD/YYYY

Effective Date

MM/DD/YYYY

Closed Date

MM/DD/YYYY

Construction Type

Select one

Construction Date

MM/DD/YYYY

LSC Form Indicator *

LSC 2012 Health Existing

Regulation Set

FED - K - 03.02

Hazmat Area Separate

Select one

FSES Date

MM/DD/YYYY

Sprinkler Status

Select one

Sprinkler Required

Select one

Building Location Detail

Additional details such as landmarks, directions, etc.

Save

Cancel

Figure 28: Inpatient Locations Building

- 8.6 Click **Save**. The **Inpatient Locations** page populates with the new building information. See *Figure 29, Inpatient Locations Buildings Information*.

The screenshot displays the 'Inpatient Locations' interface. At the top, a yellow header reads 'Inpatient Locations'. Below it, a subtitle states: 'Add and manage inpatient locations and buildings for this provider. These will be available for Life Safety Code Survey.' A red annotation 'Toggle between Locations and Buildings' with an arrow points to a toggle switch. The toggle is currently set to 'View Buildings Only', which is highlighted with a red box. To the left of the toggle is a button labeled 'Add Inpatient Location'. The main content area shows details for 'Hill House Building 2', including '1 Building' and an 'Edit' link. Below this, the 'Address' is listed as '1 State St, Anytown, FL 89099'. The 'Buildings' section contains a list item for 'The Andrea Building' with details '02 | Building | Active | No effective date' and 'Delete' and 'Edit' links. An 'Add Building' button is located to the right of the buildings list.

Inpatient Locations

Add and manage inpatient locations and buildings for this provider. These will be available for Life Safety Code Survey.

Toggle between Locations and Buildings → View Locations | **View Buildings Only**

Add Inpatient Location

Hill House Building 2 [Edit](#)

1 Building

Address

1 State St
Anytown, FL 89099

Buildings [Add Building](#)

> **The Andrea Building**
02 | Building | ● Active | No effective date [Delete](#) [Edit](#)

Figure 29: Inpatient Locations Buildings Information

9. Responsible Staff

Purpose: Add new, delete, or view existing staff responsible for the complaint.

Notes:

- Responsible Staff are HARP ID users.
- One SAGU and one CMSGU must be selected as Responsible Staff for an intake of a deemed provider to complete triage when CMS approval is required.
- Adding Responsible Staff ensures that the appropriate individuals receive email notifications throughout the complaint process (approval, reviewing investigation findings).

9.1 Add Responsible Staff

9.1.1 Click **Responsible Staff** on the left menu. The **Responsible Staff** page opens. See *Figure 30, Provider Responsible Staff*.

Note: The **Add Responsible Staff** page opens when there are no existing responsible staff.

Home Health Agency
Non-Deemed

< Return to Provider

Basic Information

Responsible Staff

Manage Tasks

Mailing Address

Additional Branch
Addresses

Operating and Ownership

Add Responsible Staff

Find and add the responsible staff for this provider.

First Name

Last Name

Organization

Select...

Management Unit

Select one

Work Unit

Select one

Search

Figure 30: Provider Responsible Staff

9.1.2 Click **Add Staff** when there are existing staff to add additional responsible staff. The **Add Responsible Staff** page opens.

Notes:

- It is only possible to add staff that are in the list of staff members.
- It is not possible to select options that are greyed out.
- Click the arrow next to **Name** to sort names in alphabetical or reverse alphabetical order.

9.1.3 Type last name in text box under **Last Name**.

9.1.4 Select **CMS** or **State** from the **Organization** drop-down menu.

9.1.5 Click **Search**. The search results appear below.

9.1.6 Check the box under **Select** next to the correct name.

9.1.7 Click **Save**.

9.1.8 Verify the staff member appears in the list below **Responsible Staff**.

Note: Click **Add Staff** to add additional Responsible Staff.

9.2 Delete Responsible Staff

9.2.1 Click **Delete** under **Actions** to delete a staff member. A confirmation pop-up window opens.

9.2.2 Click **Delete**. See *Figure 31, Delete a Responsible Staff*.

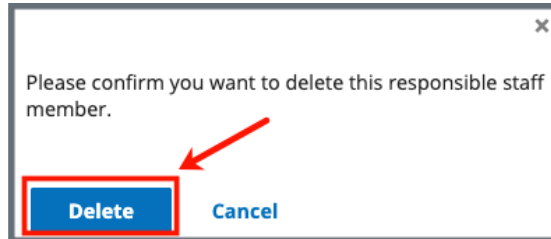


Figure 31: Delete a Responsible Staff

9.2.3 Verify that the staff member is no longer on the list.

10. Manage Tasks

Purpose: To manage and assign tasks for Nursing Home Responsible Staff.

Note: **Manage Tasks** is enabled for the Nursing Home provider type only.

Click **Manage Tasks** on the left menu. The Manage Tasks screen opens. See *Figure 32, Manage Tasks* and *Table 5, Manage Tasks Detailed Callout*.

Manage Tasks

Manage and assign tasks for your responsible staff.

Assign users to start managing task details.

Tasks **a** All × Search tasks ×

b Filter View All

c **Task** **d** **Due Date** **e** **Status** **f** **Assigned To** **g** **Comments**

Provider Maintenance	MM/DD/YYYY	Complete	SAGU_Admin_SINGY, Pat × Assign Staff ×	+
Licensure Review	MM/DD/YYYY	To Do	SAGU_Admin_SINGY, Pat × test2.CMSSINGY, Pat × Assign Staff	+
Scheduling	MM/DD/YYYY	To Do	SAGU_Admin_SINGY, Pat × test2.CMSSINGY, Pat × Assign Staff	+

Figure 32: Manage Tasks

Table 5: Manage Tasks Detailed Callout

No.	Description
1	Select individual tasks from the drop-down menu under Tasks to assign to the Responsible Staff or select All
2	Select View All , Assigned , or Unassigned from the drop-down menu. View All is the default.
3	Each task that is selected shows under Task
4	The Due Date of the task
5	The Status of the task.
6	The Responsible Staff assigned to the task. More than one Responsible Staff can be assigned the task.
7	Click the + icon to add a comment.

11. Buildings/Wings

Purpose: To add and manage locations and buildings for Life Safety Code surveys.

Note: **Buildings/Wings** is enabled for the Nursing Home provider type only.

11.1 View Buildings and Wings

Click **Buildings/Wings** on the left menu. See *Figure 33, Buildings/Wings*. The **Buildings/Wings** page opens.

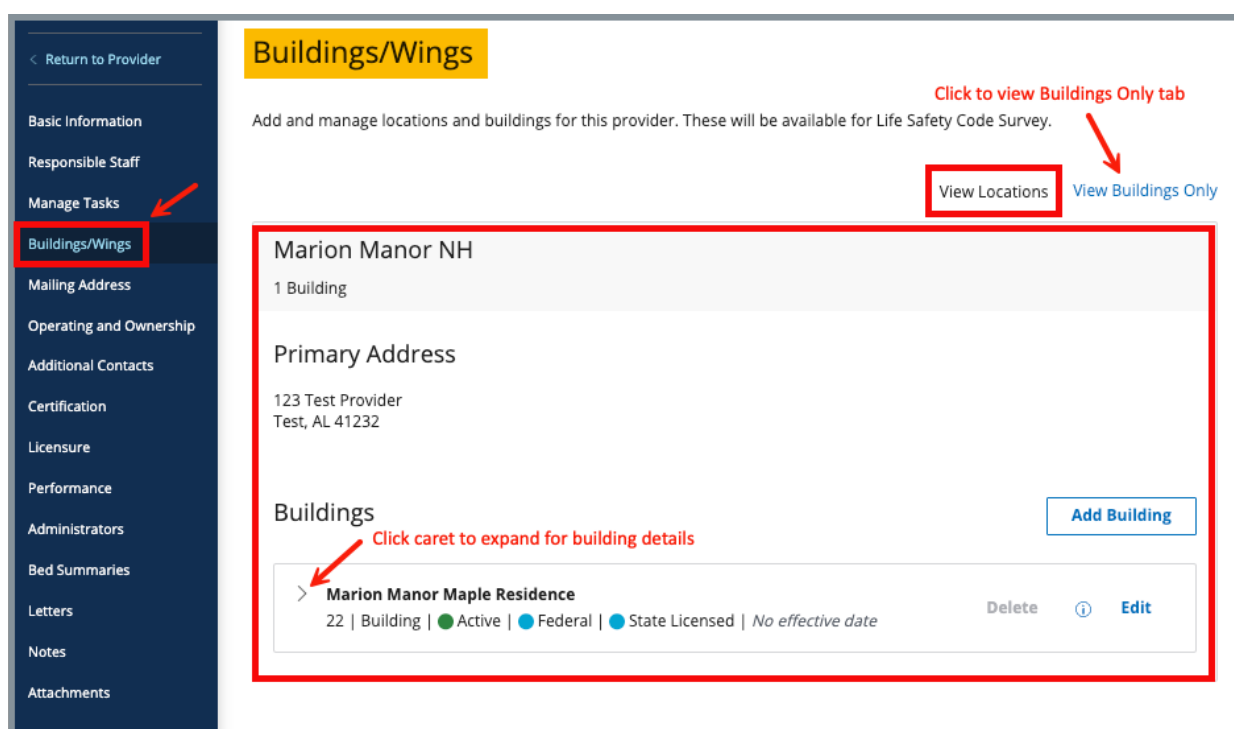


Figure 33: Buildings/Wings

Notes:

- The **Buildings/Wings** page can be viewed for the Location or for the buildings associated with the location. Toggle between **View Location** and **View Buildings Only** to see each view. **View Locations** shows the address of the building. **View Buildings Only** shows information about open and closed buildings. See *Figure 34, View Buildings Only*.
- A building must be added before an LSC survey can be created.

Buildings/Wings

Add and manage locations and buildings for this provider. These will be available for Life Safety Code Survey.

[View Locations](#)[View Buildings Only](#)

Open Buildings

1 Building

Click caret to expand for building details

>

Marion Manor Maple Residence
22 | Building | ● Active | ● Federal | ● State Licensed | *No effective date* |
Marion Manor NH

[Delete](#) [i](#)
[Edit](#)

Closed Buildings

No Buildings

No buildings

Your buildings will show up here.

Figure 34: View Buildings Only

11.2 Add a Building

11.2.1 Click **Add Building** on the **View Locations** tab. The **New Building** window opens directly below Buildings. See *Figure 35, Add New Building*.

Buildings Add Building

All required fields are marked with an asterisk. (*)

Parent Location *
Marion Manor NH

Building Name *
500 characters

Building Licensure
☐ State Licensed

Building ID *
Limit 2 characters

Type *
Select one

Number of Stories

Plan Approval Date
MM/DD/YYYY

Effective Date
MM/DD/YYYY

Closed Date
MM/DD/YYYY

Construction Type
Select one

Construction Date
MM/DD/YYYY

Federal LSC Form Indicator *
Select one

Regulation Set

State LSC Form Indicator *
Select one

Regulation Set

Hazmat Area Separate
Select one

FSES Date
MM/DD/YYYY

Sprinkler Status
Select one

Sprinkler Required
Select one

Building Location Detail
Additional details such as landmarks, directions, etc.

Save Cancel

Figure 35: Add New Building

11.2.2 Fill out the information.

Notes:

- The **Building ID** is determined at the state level. The **Building ID** is added to the Statement of Deficiencies and cannot be changed or edited once saved.
- The **LSC Form Indicator** specifies the LSC regulation set that applies to the building.

11.2.3 Click **Save**. The new building information appears in the **Buildings** section. See *Figure 36, New Building Information*.

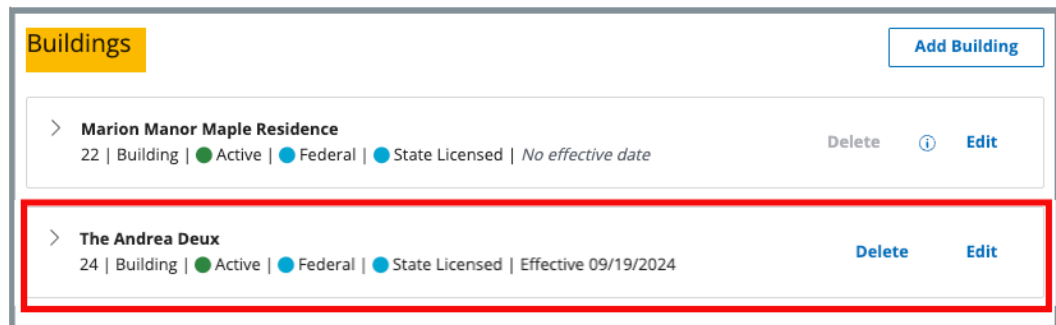


Figure 36: New Buildings Information

Note: Click **Add Building** to add additional buildings.

11.3 Delete a Building

Note: **Delete** is disabled (greyed out) when a citation is associated with a building.

- 11.3.1 Click **Delete** next to the building that needs to be deleted. A pop-up window opens asking for confirmation of the deletion. See *Figure 37, Delete Building Pop-up Window*.

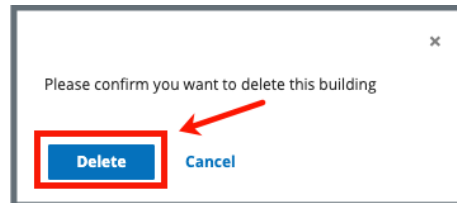


Figure 37: Delete Building Pop-up Window

- 11.3.2 Click **Delete** again. The building is removed from the **Buildings** list.

11.4 Edit a Building

11.4.1 Click **Edit** next to the building that needs to be edited. The current building information populates below **Buildings** and can be edited.

11.4.2 Click **Save**.

12. Mailing Address

12.1 Add a new mailing address

12.1.1 Click **Mailing Address** on the **Provider Details** window. See *Figure 38, Provider Mailing Address*. The **Mailing Address** window opens.

< Return to Provider

Basic Information

Responsible Staff

Manage Tasks

Buildings/Wings

Mailing Address

Operating and Ownership

Additional Contacts

Certification

Licensure

Performance

Mailing Address

☐ Same as Practice Location

Address 1 *

Address 2

City *

State *

ZIP Code *

Select one

Save

Figure 38: Provider Mailing Address

12.1.2 Fill out the information.

12.1.3 Click **Save**. The **Mailing Address** updates.

12.2 Edit an existing address

12.2.1 Click **Mailing Address** on the **Provider Details** window. The **Mailing Address** window opens

12.2.2 Click **Edit**. See *Figure 39, Edit Mailing Address*.

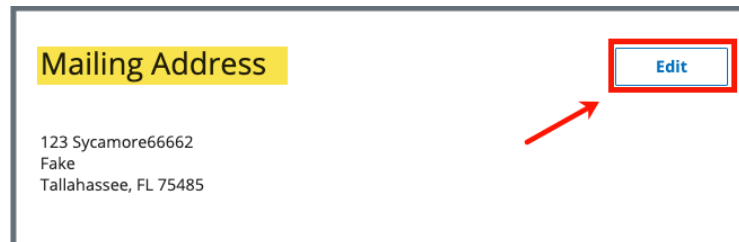


Figure 39: Edit Mailing Address

12.2.3 Fill out the information.

12.2.4 Click **Save**. The Mailing Address is added.

13. Locations

Note: **Locations** is enabled for the ASC provider type only.

Click **Locations** on the left menu of the **Provider Details** window. See *Figure 40, Locations*. The **Locations** window opens.

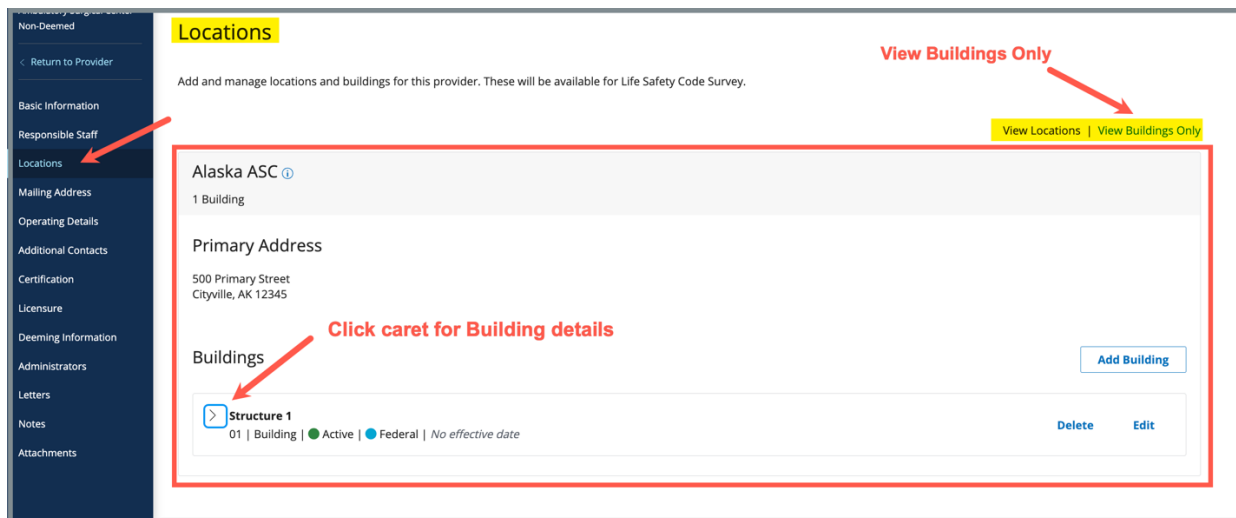


Figure 40: Locations

Notes:

- The **Locations** page can be viewed for the Location or for the buildings associated with the Location. Toggle between **View Location** and **View Buildings Only** to see each view. **View Locations** shows the address of the building. **View Buildings Only** shows information about open and closed buildings.
- In the example above, **View Buildings Only** is in blue, so the buildings are what is shown.
- A building must be added to create an LSC survey.
- ASC providers can have only one location, but they can have multiple buildings associated with that location.

13.1 Add a building

13.1.1 Click **Add Building** on the **View Locations** tab. The **New Building** window opens directly below Buildings. See *Figure 41, New Building*.

Buildings Add Building

New Building X

All required fields are marked with an asterisk. (*)

Parent Location
Andrea's All-Inclusive ASC

Building Name *
500 characters

Building ID *
Limit 2 characters

Type *
Select one

Building Licensure
☐ State Licensed Only

Number of Stories

Plan Approval Date
MM/DD/YYYY

Effective Date
MM/DD/YYYY

Closed Date
MM/DD/YYYY

Construction Type
Select one

Construction Date
MM/DD/YYYY

LSC Form Indicator *
Select one

Regulation Set

Hazmat Area Separate
Select one

FSIS Date
MM/DD/YYYY

Sprinkler Status
Select one

Sprinkler Required
Select one

Building Location Detail
Additional details such as landmarks, directions, etc.

Save **Cancel**

Figure 41: New Building

13.1.2 Fill out the information.

Notes:

- The **Building ID** is determined at the state level. The **Building ID** is added to the Statement of Deficiencies and cannot be changed or edited once saved.
- The **LSC Form Indicator** specifies the LSC regulation set that applies to the building.

13.1.3 Click **Save**. The new building information appears in the **Buildings** section. See *Figure 42, New Building Information*.

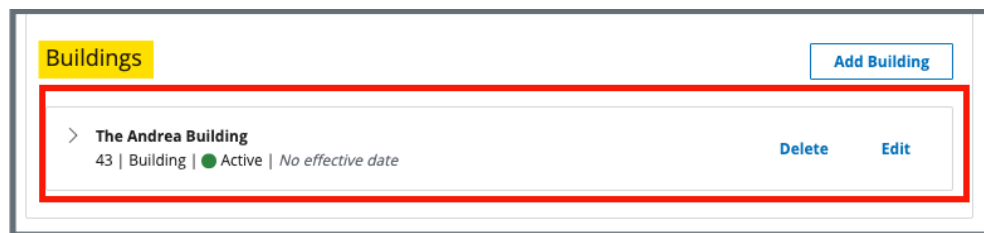


Figure 42: New Buildings Information

Note: Click **Add Building** to add additional buildings.

13.2 Delete a building

Note: **Delete** is disabled (greyed out) when a citation is associated with a building.

- 13.2.1 Click **Delete** next to the building that needs to be deleted. A pop-up window opens asking for confirmation of the deletion. See *Figure 43, Delete Building Pop-up Window*.

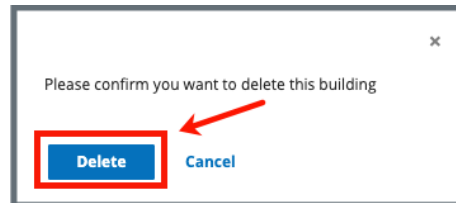


Figure 43: Delete Building Pop-up Window

- 13.2.2 Click **Delete** again. The building is removed from the **Buildings** list.

13.3 Edit a building

13.3.1 Click **Edit** next to the building that needs to be edited. The current building information populates below **Buildings** and can be edited.

13.3.2 Click **Save**.

14. Multiple Locations

Notes:

- **Multiple Locations** is enabled for the Hospice provider type only.
- Hospice providers can have multiple locations. Multiple locations are not considered as part of the Life Safety Code survey process.

14.1 Add a Location

14.1.1 Click **Multiple Locations** on the left menu of the **Provider Details** window. See *Figure 44, Multiple Locations*. The **Locations** window opens.

Multiple Locations
All required fields are marked with an asterisk (*)

Location Name *

Status: Open Open Date: MM/DD/YYYY

Address

Address 1 * Address 2

City * State * ZIP Code *

County

Save

Figure 44: Multiple Locations

14.1.2 Fill out the information.

Notes:

- The **Building ID** is determined at the state level. The **Building ID** is added to the Statement of Deficiencies and cannot be changed or edited once saved.
- The **LSC Form Indicator** specifies the LSC regulation set that applies to the building.

- 14.1.3 Click **Save**. The new location information appears in the **Multiple Locations** section. See *Figure 45, Multiple Locations Information*.

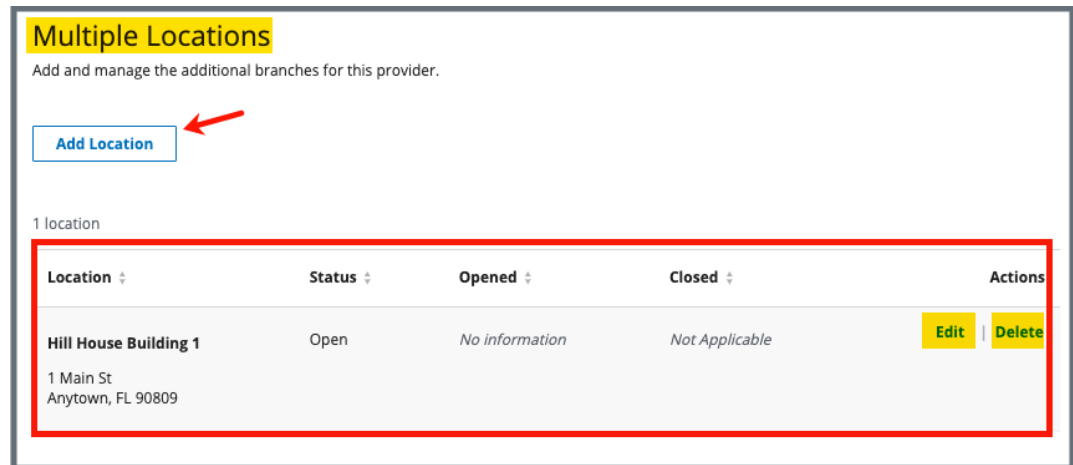


Figure 45: Multiple Locations Information

Note: Click **Add Location** when there is another location to add.

14.2 Delete a Location

Note: A location cannot be deleted if there is a Medicare Branch ID tied to it.

14.2.1 Click **Delete** next to the location that needs to be deleted. A pop-up window opens asking for confirmation of the deletion. See *Figure 46, Delete Location Pop-up Window*.

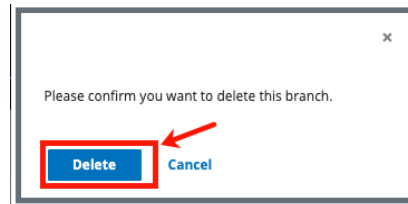


Figure 46: Delete Location Pop-up Window

14.2.2 Click **Delete** again. The location is removed from the **Multiple Locations** list.

14.3 Edit a Building

14.3.1 Click **Edit** next to the location that needs to be edited. The current location information opens and can be edited. See *Figure 47, Edit Multiple Locations*.

Multiple Locations

All required fields are marked with an asterisk (*)

Location Name *

Hill House Building 1

Status *

☒ Open

☐ Closed

Open Date

MM/DD/YYYY

Address

Address 1 *

1 Main St

Address 2

City *

Anytown

State *

Florida

ZIP Code *

90809

County

Save **Cancel**

Figure 47: Edit Multiple Locations

14.3.2 Update information.

14.3.3 Click **Save**.

15. Additional Branch Addresses

Note: **Additional Branch Addresses** is enabled for the HHA provider type only.

Notes:

- All non-Medicaid additional branch addresses are automatically reviewed by CMS. An email is then automatically sent to notify the SAGU of approval/disapproval.
- Medicaid Branch IDs do not need CMS approval.
- Providers must be certified to add an additional branch.
- New branches are assigned Branch CCNs.

15.1 Click **Additional Branch Addresses** on the **Provider Details** window. See *Figure 48, Provider Additional Branch Addresses*. The **Add Branch** window opens if there are no existing additional branches. If there are existing branches, click **Add Branch**.

Add Branch
All required fields are marked with an asterisk (*)

Branch Name *

Branch Type
Select one

Medicare Branch ID
Automatically generated upon CMS approval if the provider is certified

CMS Decision Date
No information

CMS Decision Time
No information

Additional Comments
No information

CMS Approval Notification *
Add and manage the CMS users who will be notified for approval of the Medicare Branch ID.
[Add CMS General Users](#)

There are no staff members added.

Branch Status
Open

Open Date
MM/DD/YYYY

Branch Address

Address 1 *

Address 2

City *

State *
Select one

ZIP Code *

County

[Save](#)

Figure 48: Provider Additional Branch Addresses

15.2 Fill out the information.

15.3 Click **Save**. The **Additional Branch Addresses** updates and the multiple locations update is saved.

Notes:

- There must be a designated CMSGU to approve the additional branch.
- An automatic email is sent to the CMSGU when **Save** is clicked.
- The CMS user then approves or disapproves the additional branch address.
- An automatic email is sent to the SAGU with the decision.
- Once the **Branch ID** is assigned, the additional branch can be edited but no longer be deleted.

16. Operating and Ownership

16.1 Operating Details

- 16.1.1 Click **Operating and Ownership** on the **Provider Details** window. See *Figure 49, Provider Operating Details*. The **Operating Details** window opens.

Operating Details	
Operating Status	Open
Date Opened	No information
Date Closed	No information
Insurance Expiration Date	No information
Fiscal Year End Month	No information
Special Operating Hours	No information

Change of Ownership

[Add CHOW Record](#)

There is no change of ownership for this provider.

Figure 49: Provider Operating Details

- 16.1.2 Click **Edit** to make any updates. The editable **Operating Details** page opens.
- 16.1.3 Update information as needed.
- 16.1.4 Click **Save**. The **Operating Details** page opens, and the updated information is shown.

16.2 Change of Ownership (CHOW)

16.2.1 Click **Operating and Ownership** on the **Provider Details** window.

16.2.2 Click **Add CHOW Record**. See *Figure 50, Add CHOW Record*. The **Add Change of Ownership** window opens. See *Figure 51, Add Change of Ownership*.



Figure 50: Add CHOW Record

Figure 51: Add Change of Ownership with Assignment

Note: There are two types of ownership:

With Assignment

The owner takes responsibility and ownership of the history of the provider. All prior information is retained and transfers to the new owner, including surveys and CCN.

Without Assignment

The current provider is terminated, and a new provider is created. No surveys or CCN are retained.

With Assignment

- Select **With Assignment** (see *Figure 52, With Assignment*) under **Change of Ownership Type**.

Add Change of Ownership

Change of Ownership Type *

With Assignment

Request Received Date

Effective Date *

MM/DD/YYYY

MM/DD/YYYY

Save Cancel

Figure 52: With Assignment

Note: The **Request Received Date** is the date the CHOW recommendation was received from the State Agency.

- Type **Effective Date** or enter date from pop-up calendar.
- Click **Save**. The **Operating Details/Change of Ownership** window opens.
- Verify the CHOW record is correct. See *Figure 53, With Assignment CHOW Record*.

Change of Ownership

Add CHOW Record

Type	Related Provider	Request Received	Effective Date	Actions
With Assignment	No information	No information	12/06/2023	Edit

Figure 53: With Assignment CHOW Record

Without Assignment

- a. Select **Without Assignment** (see *Figure 54, Without Assignment*) under **Change of Ownership Type**.

Add Change of Ownership

Change of Ownership Type *

Without Assignment

Request Received Date

MM/DD/YYYY

Effective Date *

MM/DD/YYYY

Previous Provider Name *

Find Facility

Save Cancel

Figure 54: Without Assignment

Note: The **Request Received Date** is the date the CHOW recommendation was received from the State Agency.

- b. Type **Effective Date** or enter date from pop-up calendar.
- c. Click **Find Facility**. The **Select Related Provider** pop-up window opens. See *Figure 55, Select Related Provider*.

Select Related Provider

Be sure to review state is correct

Search for Provider

AL 2297049 Search

Enter provider or DBA name, CCN, or State Facility ID (FACID)

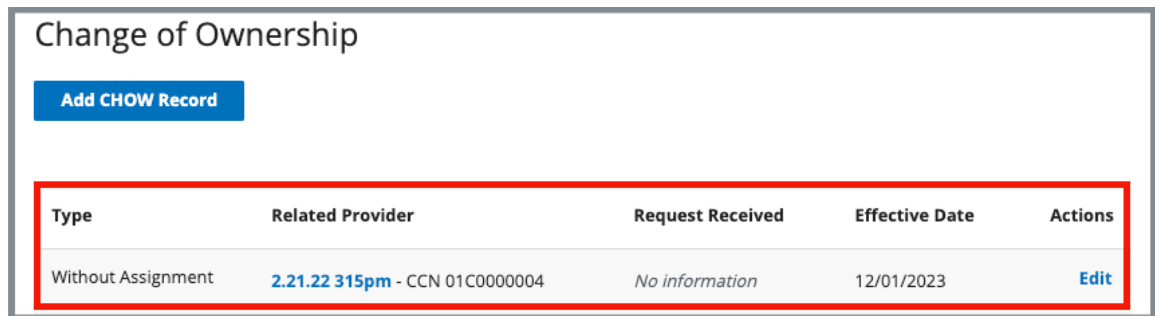
1 Provider

Provider	ID	Provider Type	Deemed Status
2.21.22 315pm	CCN 01C0000004 FACID IQ00000002684700	ASC	Non-Deemed

Submit Cancel

Figure 55: Select Related Provider

- d. Select state from the drop-down menu.
- e. Type **provider** or **DBA name, CCN, or State Facility ID (FACID)** under **Search for Provider**.
- f. Click **Search**.
- g. Select the radio button next to the correct provider.
- h. Click **Submit**. The **Add Change of Ownership** window opens.
- i. Click **Save**. The **Operating Details/Change of Ownership** window opens.
- j. Verify the CHOW record is correct. See *Figure 56, Without Assignment CHOW Record*.



Change of Ownership				
Add CHOW Record				
Type	Related Provider	Request Received	Effective Date	Actions
Without Assignment	2.21.22 315pm - CCN 01C0000004	No information	12/01/2023	Edit

Figure 56: Without Assignment CHOW Record

17. Additional Contacts

Once one additional contact is listed, the **Edit**, **Add Emergency Contact**, and **Add Additional Contact** buttons appear. See *Figure 57, Edit, Add Emergency Contact and Add Additional Contact Buttons*.

The screenshot displays a web interface titled "Additional Contacts" in a yellow header. Below the header, a contact entry for "Michael Johnson" is shown, labeled as a "Provider Contact". To the right of the name, under the "Contacts" section, are fields for "Phone" (numbered 23), "Fax", "Email", and "Website". The "Phone" field contains the number (405) 222-1111, "Fax" contains (405) 222-1112, "Email" contains mj@noemail.com, and "Website" contains www.cms.hhs.gov. To the right of these fields are two buttons: a blue "Edit" button and a grey "Delete" button. At the bottom of the interface, there are two buttons: "Add Emergency Contact" and "Add Additional Contact", both of which are highlighted with red rectangular boxes.

Additional Contacts		
Michael Johnson Provider Contact	Contacts Phone (405) 222-1111 23 Fax (405) 222-1112 Email mj@noemail.com Website www.cms.hhs.gov	Edit Delete
Add Emergency Contact Add Additional Contact		

Figure 57: Edit, Add Emergency Contact and Add Additional Contact Buttons

17.1 Add First Additional Contact

- 17.1.1 Click **Additional Contacts** on the **Provider Details** window. See *Figure 58, Provider Additional Contacts*. The **Additional Contacts** window opens.

< Return to Provider

Additional Contacts

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

Contact Name	Contact Type	
<input type="text"/>	Primary	
Phone	Ext	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>
E-Mail	Website	
<input type="text"/>	<input type="text"/>	
<input type="button" value="Save"/>		

Figure 58: Provider Additional Contacts

- 17.1.2 Fill out the information.
- 17.1.3 Click **Save**. The **Additional Contacts** updates and is listed.

17.2 Edit Additional Contacts

17.2.1 Click **Edit** to make any updates. Another **Additional Contacts** page opens and all fields except **Contact Type** can be updated.

17.2.2 Fill out the information.

17.2.3 Click **Save**.

17.3 Add Emergency Contact

17.3.1 Click **Add Emergency Contact** to add an emergency contact. **Another Additional Contacts** page opens and all fields except **Contact Type** can be updated.

17.3.2 Fill out the information.

17.3.3 Click **Save**.

17.4 Add Additional Contact After One Contact has been Added

17.4.1 Click **Add Additional Contact** to add an emergency contact. **Another Additional Contacts** page opens and all fields except **Contact Type** can be updated.

17.4.2 Fill out the information.

17.4.3 Click **Save**.

18. Certification

Notes:

- Certified providers have a unique system-generated CCN assigned. The CCNs are state and provider-specific.
- Only CMS General Users can change the certification status from **Pending** to **Certified** for a Medicare, Medicare/Medicaid provider.
- State Agency users with S&C Provider Administrator or State Agency Admin privileges can certify and terminate Medicaid Title 19.
- The certification date derives from the most recent survey exit date and is editable for non-deemed Providers.
- **Certification Date** is editable for deemed providers when there is no certification survey in iQIES.
- **Certification Changes and CCN transitions:** Users with appropriate privileges can edit and update the **Certification Title**. The system automatically assigns the applicable CCN, and the prior record will be listed in the [Certification History table](#).

- 18.1 Click **Certification** on the **Provider Details** window. See *Figure 59, Provider Federal Certification Details*. The **Certification** window opens with details on the certification and the certification history.

Certification

[Edit](#)

Federal Certification

Federal Certification Status	Certified
CCN	A28439
Certification Date	01/05/2022 ⓘ
Original Participation Date	No information
Title	Medicare - 18
NPI	No information

Certification History

Certification Status	Certification Title	CCN	Certification Date	Original Participation Date	Termination Date	Withdrawal Type
Certified	No information	No information	No information	No information	No information	No information

Figure 59: Provider Federal Certification Details

- 18.2 Click **Edit** to make any updates. The **Certification** page opens with current certification and certification history details.
- 18.3 Update information as needed.
- Note:** Once assigned, the CCN cannot be changed.
- 18.4 Click **Save**. The **Certification** page updates with the edited information.

19. Licensure

19.1 Click **Licensure** on the **Provider Details** window. See *Figure 60, Provider Federal Certification Details*. The **Licensure** window opens.

The screenshot shows the 'Licensure' window. On the left is a dark blue sidebar with a list of navigation options: 'Non-Deemed', '< Return to Provider', 'Basic Information', 'Responsible Staff', 'Manage Tasks', 'Mailing Address', 'Additional Branch Addresses', 'Operating and Ownership', 'Additional Contacts', 'Certification', 'Licensure' (highlighted with a red box and a red arrow), 'Deeming Information', 'Administrators', 'Letters', 'Notes', and 'Attachments'. The main content area has a yellow header 'Licensure' and a sub-header 'State Licensure'. Below this is a table with the following data:

State Licensed	Yes
State Licensure Status	Licensed
License Type	ANNUAL
License Number	B52
Issue Date	09/19/2024
Effective Date	09/19/2024
Expiration Date	09/19/2027

Below the table is a yellow header 'Additional Information' and another table with the following data:

Employer/Tax Identification Number	No information
State Facility ID	IQ00000002535606

In the top right corner of the main content area, there is a blue 'Edit' button highlighted with a red box and a red arrow pointing to it.

Figure 60: Provider Federal Certification Details

19.2 Click **Edit** to make any updates. The **Licensure** page opens.

19.3 **Update** information as needed.

Note: Once assigned, the CCN cannot be changed.

19.4 Click **Save**. The **Licensure** page updates with the edited information.

20. Deeming Information

A deemed provider is when S&C activities are handled by an Accrediting Organization (AO) instead of the state survey agency.

Only a CMS General User (CMSGU) can certify or terminate a provider.

It is not necessary to add a survey or deeming information to certify a provider.

20.1 View Deeming Information

Click **Deeming Information** on the **Provider Details** window. See *Figure 61, Deeming Information Details*. The **Deeming Information** window opens.

Notes:

- The **Deemed Status** and **Deemed Date** are directly under **Deeming Information**.
- The **State Survey Jurisdiction History** can be tracked, and the provider can be certified as deemed while under SA Jurisdiction.
- CMSGUs and State Agency General Users (SAGU) can update the **Compliance Date** and **Return to AO** date.
- Only the CMSGU can update the **Reason for Change**.
- Existing AOs, if any, are shown under the **Add Accrediting Organization** button.

Provider Details

0 Lex HHA
CCN A28243
Home Health Agency
Deemed

< Return to Provider

Basic Information

Responsible Staff

Manage Tasks

Mailing Address

Additional Branch
Addresses

Operating and Ownership

Additional Contacts

Certification

Licensure

Deeming Information

Administrators

Letters

Notes

Attachments

Deeming Information

CMS approval is required for a provider to be deemed.

Current Deemed Accreditation Status

Deemed

Current Deemed Accreditation Date ⓘ

05/01/2023

CMS Approval of Deemed Status Date ⓘ

07/14/2022

State Survey Jurisdiction History

Deemed Status Suspended Date	Compliance Date	Returned to AO Date
06/06/2022	No information	No information
05/10/2022	No information	No information

Accrediting Organizations

Add a new accrediting organization and manage accreditation organizations and status.

Add Accrediting Organization

1 Accrediting Organization

The Joint Commission (TJC)

Edit

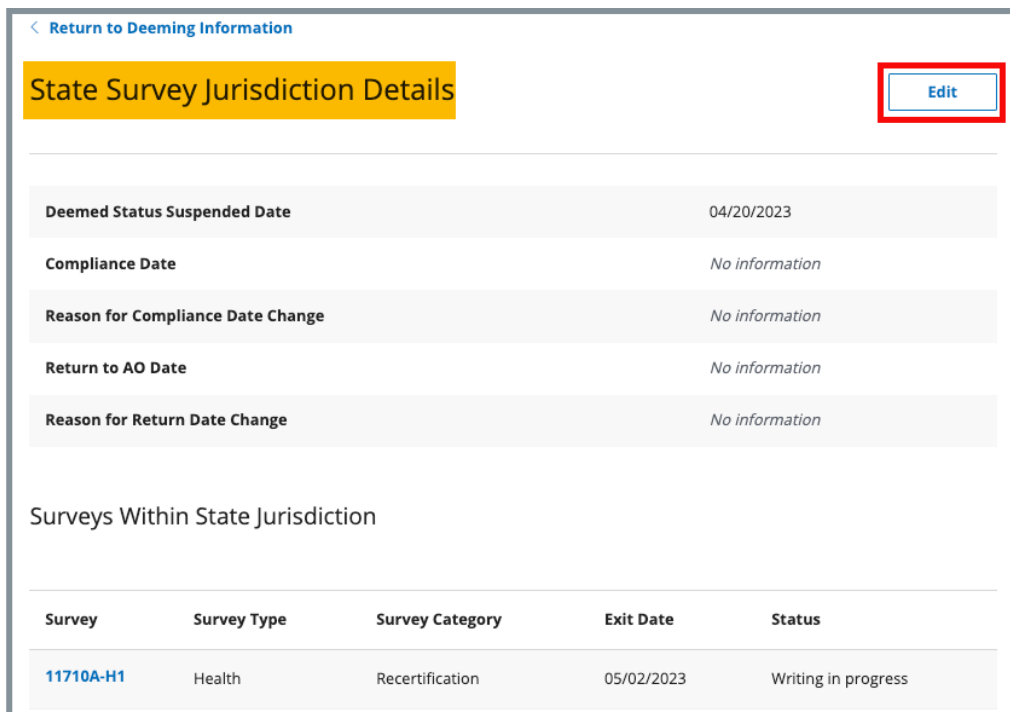
AO Facility Id	No information
Deemed Accreditation Status	Deemed Accredited
Initial Deemed Accreditation Date ⓘ	05/01/2023
Current Deemed Accreditation Date ⓘ	05/01/2023
Expiration Date	05/31/2023
CMS Approval Status	Approved

Figure 61: Deeming Information Details

20.2 View State Survey Jurisdiction History

Click **View** under **State Survey Jurisdiction History** to view or edit the Jurisdiction History on the [Deeming Information](#) page. The **State Survey Jurisdiction Details** window opens. See *Figure 62, State Survey Jurisdiction Details*.

Note: Only the CMSGU can edit the **State Survey Jurisdiction Details**. All details except for the **Deemed Status Suspended Date** can be edited.



[Return to Deeming Information](#)

State Survey Jurisdiction Details

[Edit](#)

Deemed Status Suspended Date	04/20/2023
Compliance Date	No information
Reason for Compliance Date Change	No information
Return to AO Date	No information
Reason for Return Date Change	No information

Surveys Within State Jurisdiction

Survey	Survey Type	Survey Category	Exit Date	Status
11710A-H1	Health	Recertification	05/02/2023	Writing in progress

Figure 62: State Survey Jurisdiction Details

20.3 Add Accrediting Organization

20.3.1 Click **Add Accrediting Organization** on the [Deeming Information](#) page. The **Add Accrediting Organization** window opens. See *Figure 63, Add Accrediting Organization*.

Add Accrediting Organization

All required fields are marked with an asterisk (*)

Accrediting Organization *

The Joint Commission (TJC) ▼

AO Facility ID

Accreditation Status *

☐ Pending

☒ Accredited

☐ Withdrawn

☐ Terminated

☐ Expired

Accreditation Date *

10/21/2021

MM/DD/YYYY

Expiration Date *

10/21/2024

MM/DD/YYYY

Save Section **Cancel**

Figure 63: Add Accrediting Organization

20.3.2 Fill out the applicable information.

20.3.3 Click **Save Section** to save the AO. The **Deeming Information** page opens, and the updated AO information is listed below.

Notes:

- Click **Edit** on the **Deeming Information** page to edit any AO information.
- Only CMS General Users can select the approval status and approval date of the accreditation.
- The approval date is the same date as the Accreditation Date.

21. Performance

Note: **Performance** is enabled for the Nursing Home and Hospice provider types only.

21.1 Click **Performance** on the **Provider Details** window. See *Figure 64, Performance*. The **Performance** window opens.

The screenshot shows the 'Performance' window for 'Marion Manor Nursing Home Inc'. The left sidebar lists various options, with 'Performance' highlighted. The main content area contains a form with the following fields:

- Program Selection ***: A dropdown menu with 'Select one'.
- Date Selected for Program ***: A text field with a date format 'MM/DD/YYYY'.
- Program Status**: A dropdown menu with 'Select one'.
- Survey Cycle ***: A dropdown menu with 'Select one'.
- Survey Due Date ***: A text field with a date format 'MM/DD/YYYY'.
- Status Changed Date ***: A text field with a date format 'MM/DD/YYYY'.
- Notes**: A text editor with a toolbar (B, i, U, list icons) and a 'Text Editor Keyboard Shortcuts' link.
- Save**: A blue button at the bottom of the form.

Figure 64: Performance

21.2 Fill out the information.

21.3 Click **Save**. The **Performance** page updates with Performance and Special Focus details. The page can be viewed and edited. See *Figure 65, Performance and Special Focus Details*.

Notes:

- Click **Edit** to edit information, if desired.
- It is not possible to edit or delete a note created by another user.
- The Program Selection cannot be edited.

Performance

Edit

Program Selection

Nursing Home Special Focus

Date Selected for Program

09/19/2024

Special Focus Status

Active

Survey Cycle

6 Months

Survey Due Date

10/03/2024

Last edit by: NH_CMSGU_Singy

09/19/2024

Doris Schutt has asked us to review performance.

Special Focus Details

Months as Special Focus

1

of Surveys Since in Special Focus

0

Most Recent Survey

No information

of Citations in Most Recent Survey

No information

of Surveys With IJ Cited

0

Related Survey History

Related Intakes

Related Enforcements

All Citations

Survey ID

Survey Date

Survey Category

Met/Not Met Survey

12345D-H1

00/00/0000

Recertification

✓ Met

Active

12345D-H1

00/00/0000

Recertification

✗ Not Met

Active

12345D-H1

00/00/0000

Complaint

✗ Not Met

Active

12345D-H1

00/00/0000

Recertification

✓ Met

Active

Figure 65: Performance and Special Focus Details

Note: Click each tab under **Special Focus Details** (**Related Survey History**, **Related Intakes**, **Related Enforcements**, **All Citations**) to view details about the provider performance.

22. Administrators

22.1 Click **Administrators** on the **Provider Details** window. See *Figure 66, Add Administrator*. The **Add Administrator** window opens.

The screenshot displays the 'Administrators' management interface. On the left, a sidebar contains various navigation links, with 'Administrators' highlighted in red and an arrow pointing to it. The main content area is titled 'Administrators' and includes a sub-header 'Manage all administrators for this provider.' Below this, the details for 'Henry Jekyll' are shown, including a 'Primary Administrator' badge. A table lists contact details (Phone Number, Fax Number, Email, Address) and administrator details (Administrator Type, Administrator Qualifications, License Number, Start Date, End Date, Expiration Date). In the top right corner, a red box highlights the 'Add Administrator', 'Edit', and 'Delete' buttons.

Figure 66: Add Administrator

22.2 Fill out the information.

Notes:

- Only one Administrator can be primary.
- Only the last five administrators, including the current one, can be listed.

22.3 Click **Save**. The **Administrators** page updates with new Administrator. The page can be viewed and edited.

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

22.4 Click **Delete** to delete an administrator. A pop-up window opens and asks for confirmation to delete. Click **Delete** again to confirm removal.

23. Bed Summaries

Purpose: To manage bed summaries for the provider.

Note: **Bed Summaries** is enabled for the Nursing Home provider type only.

23.1 Click **Bed Summaries** on the **Provider Details** window. See *Figure 67, Add Bed Summary*. The **Bed Summaries** window opens.

Note: The first time the **Bed Summaries** window opens, it is called **Add Bed Summary**.

Figure 67: Add Bed Summary

23.2 Fill out the information.

Note: **Total Facility Beds** and **Total Certified Beds** update automatically.

23.3 Click **Save**. The **Bed Summaries** page updates. The page can be viewed and edited. See *Figure 68, Bed Summaries* for a completed form.

Note: Click **Edit** to edit information, if desired.

Bed Summaries

Manage bed summaries for this provider.

09/19/2024

[Add Bed Summary](#) [Edit](#) [Delete](#)

Bed Summary Breakdown			
Medicare	Medicare/Medicaid	Medicaid	ICF/IID
15	25	20	5
Licensed Only			
30			
Bed Summary Totals			
Total Facility Beds	Total Certified Beds		
95	65		

Figure 68: Bed Summaries

- 23.4 Click **Delete** to delete bed summaries. A pop-up window opens and asks for confirmation to delete. Click **Delete** again to confirm removal.

24. Terminate a Provider

Purpose: To terminate a provider.

Notes:

- The CMSGU user role has permission to terminate both Medicare and Medicaid-Only providers.
- The SA Admin role and S&C Provider Administrator user roles have permission to terminate Medicaid-Only providers.
- A provider must be certified to be terminated.
- The CMSGU user role is shown. Other user roles may see slightly different screens.

24.1 Click **Certification** from the **Provider Basic Information** page. See *Figure 69, Certification Left Menu*. The **Certification** page opens.

The screenshot displays the 'Provider Basic Information' page for 'House of the Rising Sun ASC'. The left sidebar contains a list of menu items: Provider Details, Basic Information, Responsible Staff, Manage Tasks, Locations, Mailing Address, Operating and Ownership, Additional Contacts, **Certification** (highlighted with a red box and arrow), Licensure, Deeming Information, Administrators, Letters, Notes, and Attachments. The main content area shows the 'Basic Information' tab with an 'Edit' button. Below this is an 'Overview' section with a table of provider details.

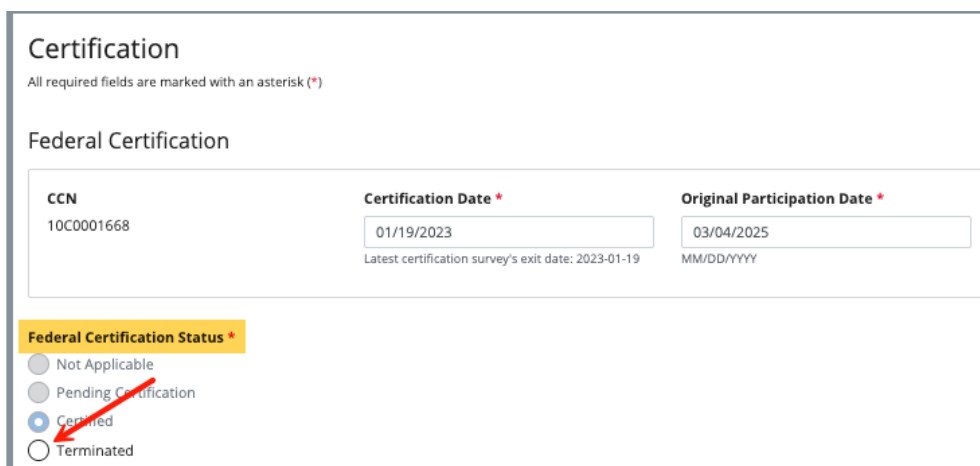
Provider Details	Federal Certification Status	Title
House of the Rising Sun ASC CCN 10C0001668 Ambulatory Surgical Center Deemed	Certified	Medicare - 18

Basic Information	
Manage the basic information for this provider. Edit	
Overview	
Provider Name	House Of The Rising Sun ASC
Provider Type	ASC
Provider Subtype	N/A
Address	1 Main St Suite 202 Anytown, FL 98765
Phone	8005551212
Phone EXT	No information
Fax	No information
Email	eburdon@fake.org
Website	No information
County	No information
CMS Location	4 - Atlanta
State Region	37 - ORLANDO
Management Unit	No information
Work Unit	No information

Figure 69: Certification Left Menu

24.2 Click **Edit**. The **Certification** page becomes editable.

- 24.3 Click **Terminated** under **Federal Certification Status**. See *Figure 70, Federal Certification Status*. Additional fields open under **Federal Certification**.



Certification
All required fields are marked with an asterisk (*)

Federal Certification

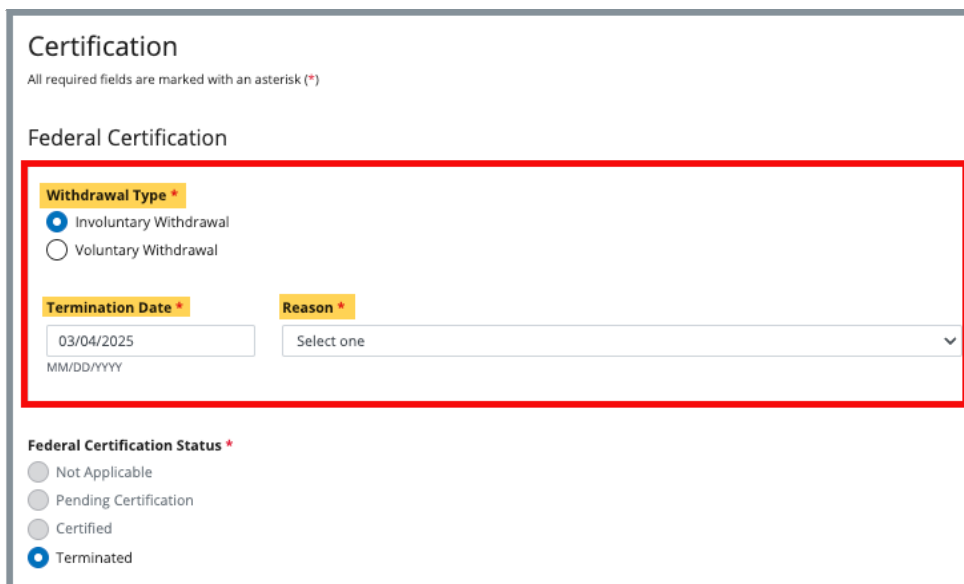
CCN 10C0001668	Certification Date * 01/19/2023 <small>Latest certification survey's exit date: 2023-01-19</small>	Original Participation Date * 03/04/2025 <small>MM/DD/YYYY</small>
--------------------------	---	---

Federal Certification Status *

☐ Not Applicable
☐ Pending Certification
☒ **Terminated**
☐ Terminated

Figure 70: Federal Certification Status

- 24.4 Select the radio button next to the **Withdrawal Type: Involuntary Withdrawal** or **Voluntary Withdrawal**.
- 24.5 Select the termination date under **Termination Date**. See *Figure 71, Federal Certification Details*.



Certification
All required fields are marked with an asterisk (*)

Federal Certification

Withdrawal Type *

☒ Involuntary Withdrawal
☐ Voluntary Withdrawal

Termination Date * 03/04/2025
MM/DD/YYYY

Reason * Select one

Federal Certification Status *

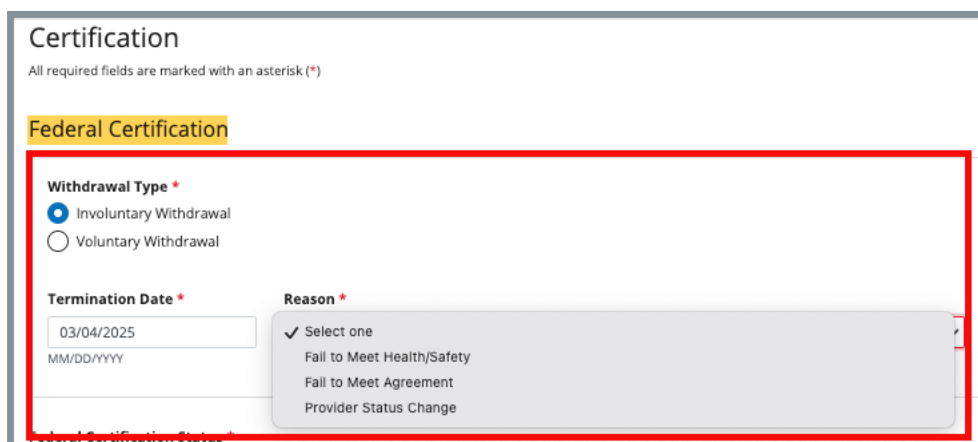
☐ Not Applicable
☐ Pending Certification
☐ Certified
☒ **Terminated**

Figure 71: Federal Certification Details

24.6 Select the reason for termination from the drop-down menu under **Reason**. See *Figure 72, Termination Reason*.

Note: There are three reasons for termination:

- Fail to Meet Health/Safety
- Fail to Meet Agreement
- Provider Status Change



Certification
All required fields are marked with an asterisk (*)

Federal Certification

Withdrawal Type *

☒ Involuntary Withdrawal
☐ Voluntary Withdrawal

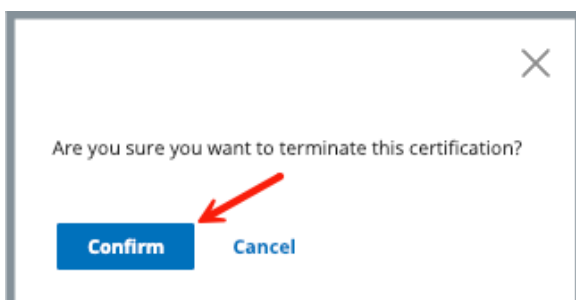
Termination Date *
03/04/2025
MM/DD/YYYY

Reason *

✓ Select one
Fail to Meet Health/Safety
Fail to Meet Agreement
Provider Status Change

Figure 72: Termination Reason

24.7 Click **Save**. A pop-up window opens to verify whether the certification should be terminated. See *Figure 73, Termination Pop-Up Window*.



Are you sure you want to terminate this certification?

Confirm Cancel

Figure 73: Termination Pop-Up Window

24.8 Click **Confirm**.

24.9 Verify that **Federal Certification Status** is now **Terminated**. See *Figure 74, Federal Certification Status*.

The screenshot displays a web interface for managing provider certification. At the top, a header bar shows 'Federal Certification Status' as 'Terminated' and 'Title' as 'No information'. Below this, a yellow 'Certification' button is visible on the left, and an 'Edit' link is on the right. The main section, titled 'Federal Certification', contains a table with the following details: Withdrawal Type (Involuntary Withdrawal), Termination Date (03/04/2025), Reason (Fail to Meet Health/Safety), CCN (10C0001668), and Title (No information). Below the table is a 'Certification History' section with a message stating 'There is no certification history for this provider.'

Federal Certification Status	
Federal Certification Status	Terminated
Title	No information

Certification Edit

Federal Certification

Withdrawal Type	Involuntary Withdrawal
Termination Date	03/04/2025
Reason	Fail to Meet Health/Safety
CCN	10C0001668
Title	No information

Certification History

There is no certification history for this provider.

Figure 74: Federal Certification Status

25. 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).

Note: Letter templates are created in the Letter Template Management section. Review [S&C User Manual: Letter Template Management](#) for more information.

25.1 Add/Upload a letter

25.1.1 Click **Letters** on the left menu to go to **Letters**. See *Figure 75, Providers Letters*.

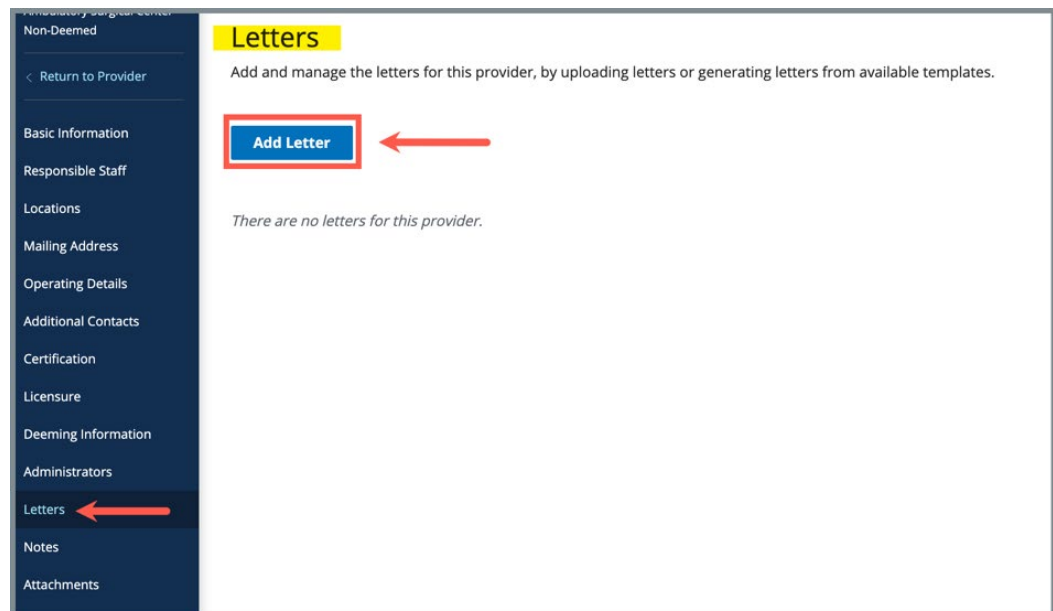
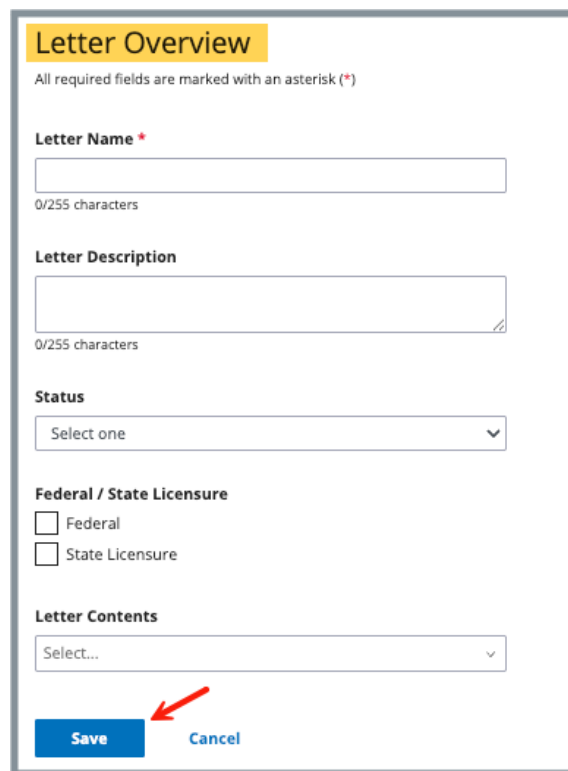


Figure 75: Providers Letters

25.1.2 Click **Add Letter**. The **Letter Overview** window opens. See *Figure 76, Providers 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**

A red arrow points to the **Save** button.

Figure 76: Providers Letter Overview

25.1.3 Fill out the information.

25.1.4 Click **Save**. The information updates in a new screen. See *Figure 77, 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 77: Letter Attachment and Recipient

25.1.5 Scroll down to **Attachments**.

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

25.1.7 Click **Select File**. The Windows Explorer window pops up. For Mac users, the Finder window pops up.

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

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

25.1.10 Click **Save**. The letter is attached to the survey.

25.2 Generate a letter from an existing template

25.2.1 Click **Add Letter**. The **Letter Overview** page opens.

Note: If there is already an existing letter that can be reused, click **Generate from template** under the **Actions** drop-down menu and go to step 25.2.5.

25.2.2 Type the letter name under **Letter Name**. Add additional information, if desired.

25.2.3 Click **Save**. The **Letter: [Template Name]** page opens.

25.2.4 Click **Generate** from template under **Attachments**. See *Figure 78, Generate from Template*. The **Add Letter** page opens.



Figure 78: Generate from Template

25.2.5 Click the circle next to the desired template. See *Figure 79, Select a Template*.

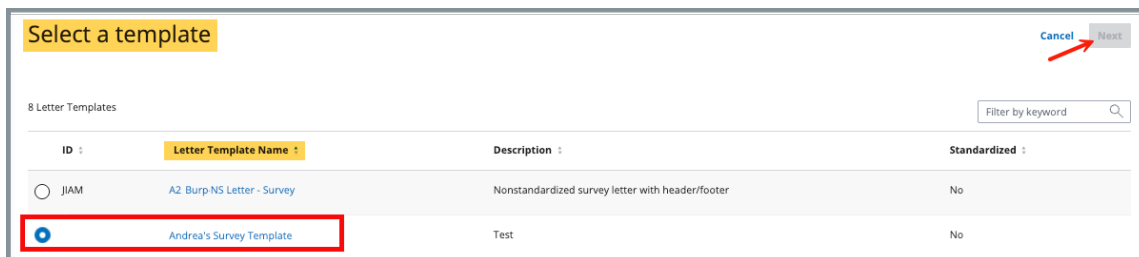


Figure 79: Select a Template

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

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

25.2.7 Update the template as desired. See *Figure 80, Letter Template*.

Notes:

- Only nonstandardized templates can be modified. Textholders can be removed, words can be edited and updated. Refer to [Appendix A, Provider Textholder Text](#) for a list of textholders. Be aware that the text changes apply only to the current letter and not to the template. Refer to the [Letter Template Management User Manual](#) on QTSO to edit the original template.
- Standardized templates cannot be modified in the Letters section of any S&C area (providers, surveys, intakes, enforcements). To modify a standardized template, the template owner must edit the template in Letter Template Management.

Create attachment

Edit and preview letter.

Andrea's Survey Template

Print Preview

File Name * Andrea's Survey Templat

Description

Rich Text Editor

Preview

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 80: Letter Template

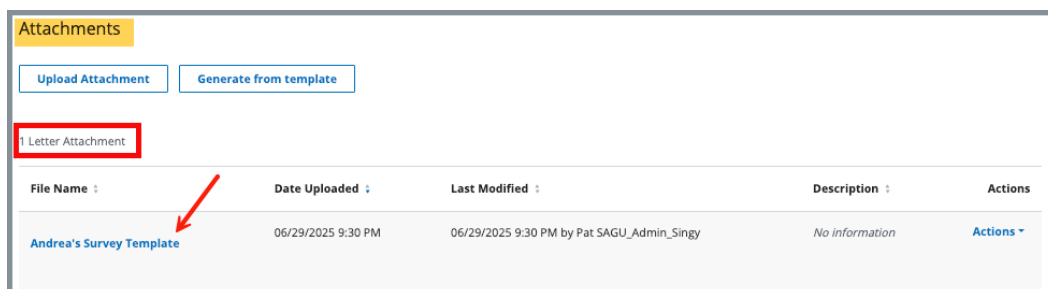
1. **Print Preview:** Click **Print Preview** to preview the .pdf version of the letter. The letter can be downloaded from **Print Preview**, if desired.
2. **File Name:** Edit the name, if desired.
3. **Description:** Enter keywords, if desired. Keywords are descriptive words that help the user find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

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

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

25.2.9 Verify the letter is attached under **File Name**. See *Figure 81, Letter Attachment*.

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



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

Figure 81: Letter Attachment

25.3 Add Recipients to a letter

25.3.1 Click **Add Recipient** to add a recipient. The Add Recipient page opens. See *Figure 82, 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 82: Add Recipient

25.3.2 Fill out the information.

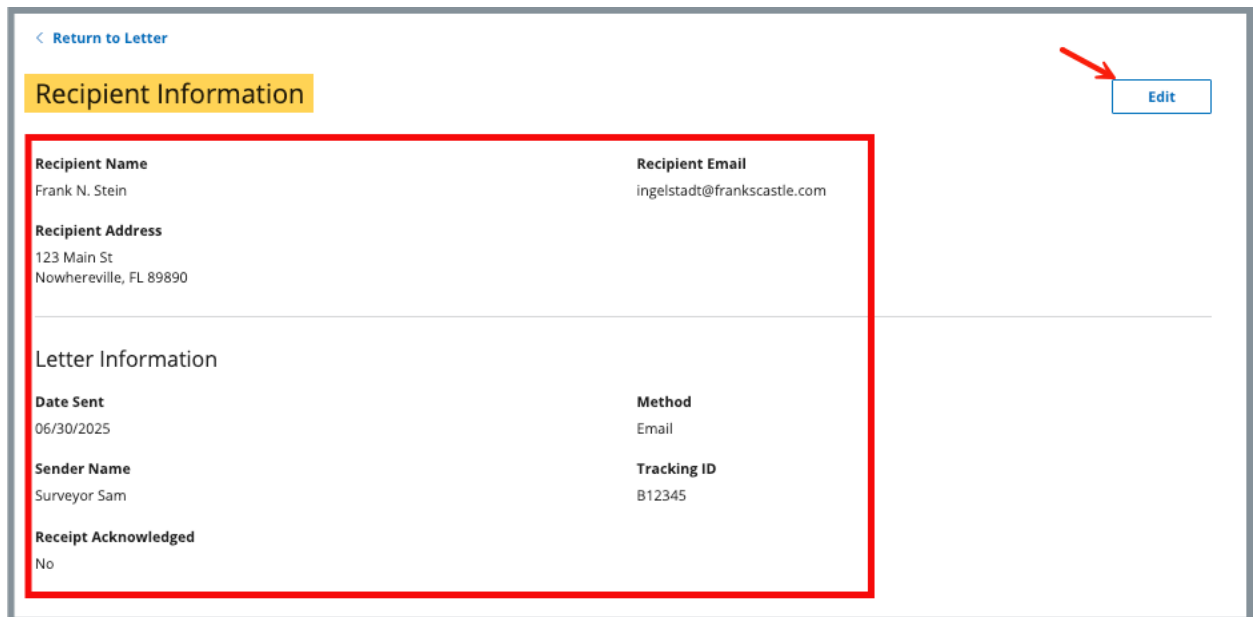
Notes:

- **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.

25.3.3 Click **Save**. The **Recipient Information** updates. See *Figure 83, Recipient Information*.

Note:

- 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 83: Recipient Information

25.4 Edit a Letter Overview

25.4.1 Click **Edit Overview** from the **Actions** drop-down menu to edit a Letter Overview. See *Figure 84, Edit a Letter Overview*. The **Edit Letter Overview** opens. See *Figure 85, Edit Letter Overview*.

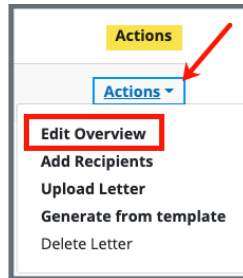


Figure 84: Edit a Letter Overview

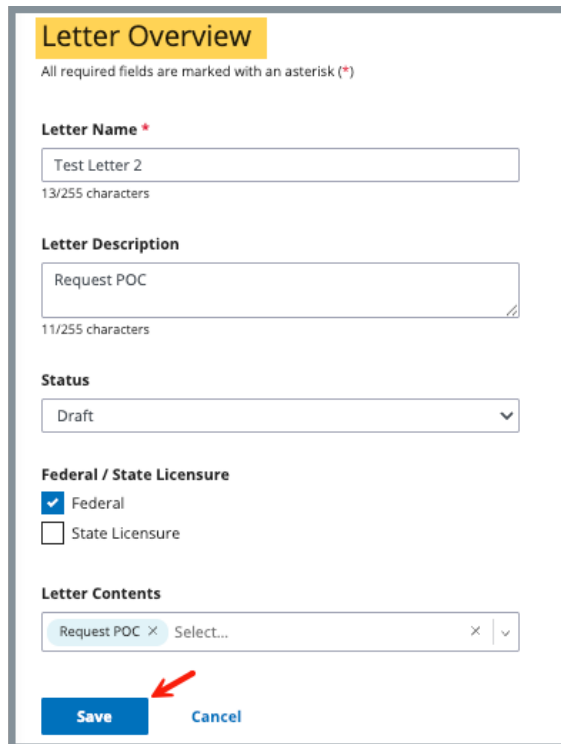
A screenshot of a web form titled 'Letter Overview' in a yellow header. Below the title, a note states 'All required fields are marked with an asterisk (*)'. The form contains several sections: 'Letter Name *' with a text input field containing 'Test Letter 2' and a character count '13/255 characters'; 'Letter Description' with a text input field containing 'Request POC' and a character count '11/255 characters'; 'Status' with a dropdown menu showing 'Draft'; 'Federal / State Licensure' with two radio buttons, 'Federal' (checked) and 'State Licensure' (unchecked); and 'Letter Contents' with a tag input field containing 'Request POC' and a 'Select...' dropdown. At the bottom, there are two buttons: a blue 'Save' button and a light blue 'Cancel' button. A red arrow points to the 'Save' button.

Figure 85: Edit Letter Overview

25.4.2 Update fields.

25.4.3 Click **Save**.

25.5 Edit a Standardized Letter Attachment Description

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

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

25.5.2 Edit or add a description in the **Description** field. See *Figure 86, Standardized Letter Description*.

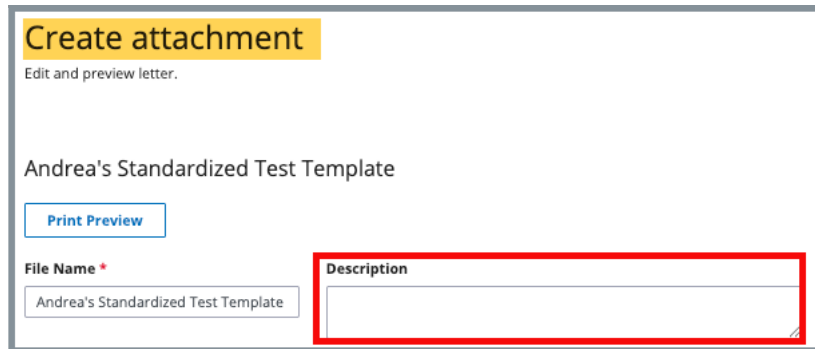
The screenshot shows a web interface titled "Create attachment" in a yellow header. Below the header, it says "Edit and preview letter." The main content area displays "Andrea's Standardized Test Template" with a "Print Preview" button. At the bottom, there are two input fields: "File Name" (containing "Andrea's Standardized Test Template") and "Description" (which is empty and highlighted with a red rectangular border). A small red triangle icon is visible in the bottom right corner of the "Description" field.

Figure 86: Standardized Letter Description

25.5.3 Click **Create Attachment**.

25.6 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.

25.6.1 Click the letter name on the **Letters** page. See *Figure 87, Click Letter Name*. The letter detail page opens with **Overview**, **Attachments**, and **Recipients** sections. See *Figure 88, Letter Details Page*.

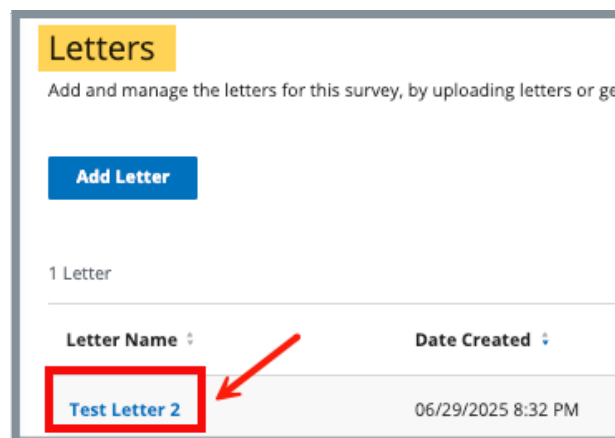


Figure 87: Click Letter Name

[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 88: Letter Details Page

25.6.2 Scroll to the **Attachments** section.

25.6.3 Select **Edit** from the drop-down list under **Actions**. See *Figure 89, 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.

Attachments				
<div>Upload Attachment</div> <div>Generate from template</div>				
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	<div>Actions</div> <div>Delete</div> <div>Edit</div> <div>Finalize</div>

Figure 89: Edit

25.6.4 Make any necessary changes. See *Figure 90, Edit Attachment Page*.

Note: See [Appendix B](#) for tips and tricks for working in a template.

Edit attachment

Edit and preview letter.

Cancel

Save

Print Preview

File Name *


Andrea's Survey Template

Description

<> [Icons]

Rubik 14px

[Icons]


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 90: Edit Attachment Page

25.6.5 Click **Save**.

Notes:

The letter can now be regenerated with these changes.

25.7 Finalize a Letter Attachment

Note: No changes can be made once a letter is finalized.

- 25.7.1 Select **Finalize Letter** from the **Actions** drop-down menu to finalize a letter attachment. A pop-up window opens. See *Figure 91, Finalize Letter Pop-Up Window*.

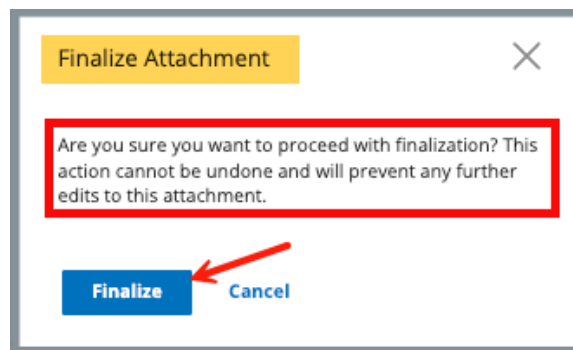


Figure 91: Finalize Letter Pop-Up Window

- 25.7.2 Click **Finalize**. The letter overview opens.
- 25.7.3 Verify that the letter states **Finalized** under the **Actions** menu. See *Figure 92, Finalized*.

Attachments				
<div>Upload Attachment</div> <div>Generate from template</div>				
1 Letter Attachment				
File Name	Date Uploaded	Last Modified	Description	Actions
Andrea's Survey Template	06/29/2025 9:30 PM	06/30/2025 6:41 PM by Pat SAGU_Admin_SINGY	Missing Requirements	Finalized

Figure 92: Finalized

25.8 Delete a Letter Attachment

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

- 25.8.1 Select **Delete** from the **Actions** drop-down menu to delete a letter. A pop-up window opens. See *Figure 93, Delete Letter Pop-Up Window*.

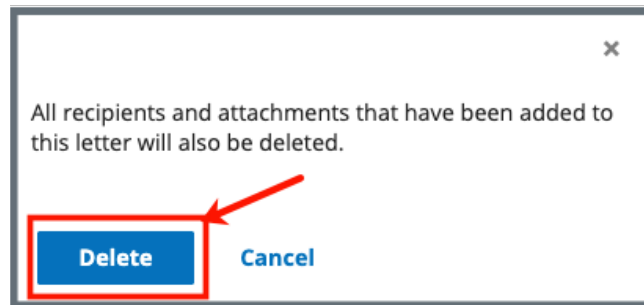


Figure 93: Delete Letter Pop-Up Window

- 25.8.2 Click **Delete**. The letter is removed from the list.

26. Notes

Purpose: To add or review any notes. For example, notes can be added to give detailed administrator history, etc.

26.1 Click **Notes** on the left menu to view existing notes or add a note. See *Figure 94, Add Note*.

Note: When there are no existing notes, the **Add Note** page opens automatically when **Notes** is selected as in the figure below. When there are existing notes, click **Add Note** to add a new note.

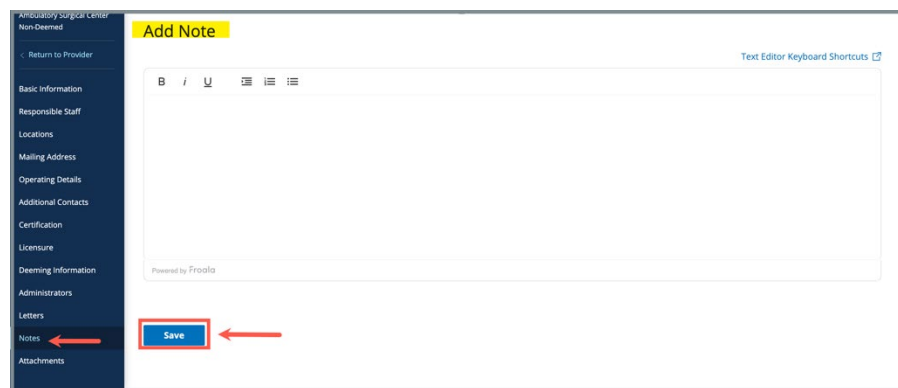


Figure 94: Add Note

26.2 Add a note.

26.3 Click **Save**. The **Notes** window opens with note information. See *Figure 95, Notes*.

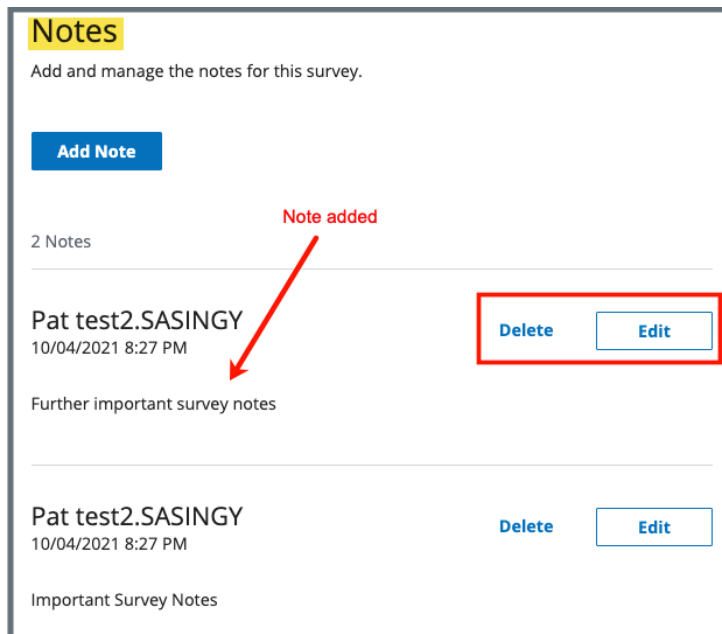


Figure 95: Notes

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

- 26.4 Click **Delete** to delete a note. A pop-up note opens. See *Figure 96, Delete Note Pop-Up Window*.

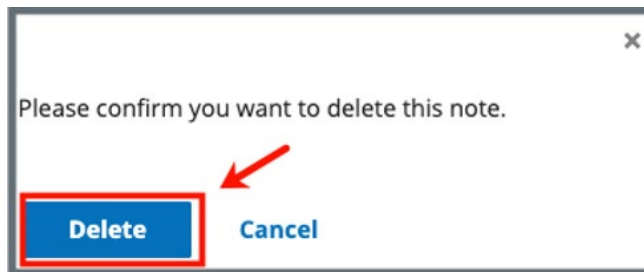


Figure 96: Delete Note Pop-Up Window

- 26.5 Click **Delete**. The updated **Notes** page opens.

27. Attachments

Note: Only one attachment can be added at a time.

27.1 Click **Attachments** on the left menu. The **Attachments** window opens. See *Figure 97, Attachments*.

The screenshot shows the 'Attachments' window. At the top, the title 'Attachments' is highlighted in yellow. Below it, a subtitle reads 'Add attachments for this provider and add a file description below.' A red box highlights the 'Select File' button. Below the button, a list of supported file formats is provided: 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). A red arrow points from the text 'Attachment name' to the text 'Provider John Doe Letter.docx', which is highlighted in yellow. To the right of this text is a 'Remove' link. Below this, a red box highlights the 'File Description' field, which is empty and has a character count of '0/255 characters'. To the right of the field, the text 'Optional: Type file description' is displayed. At the bottom left, a blue 'Save' button is highlighted with a red arrow pointing to it.

Figure 97: Attachments

27.2 Click **Select File**. The Windows Explorer window pops up. For Mac users, the Finder window pops up.

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

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

27.5 Click **Save**. The file is attached to the survey.

Note: Click **Edit** to edit information, or click **Download** to download the document, if desired. See *Figure 98, Edit or Download an Existing Attachment*.

textfile.txt

Existing attachment

Edit

Date Uploaded

08/04/2021 12:13 PM

Uploaded By

Pat x

File Size

0 KB

Category

Survey

Source

[Survey 793755](#)

Download

Figure 98: Edit or Download an Existing Attachment

Appendix A: Provider Textholder Text

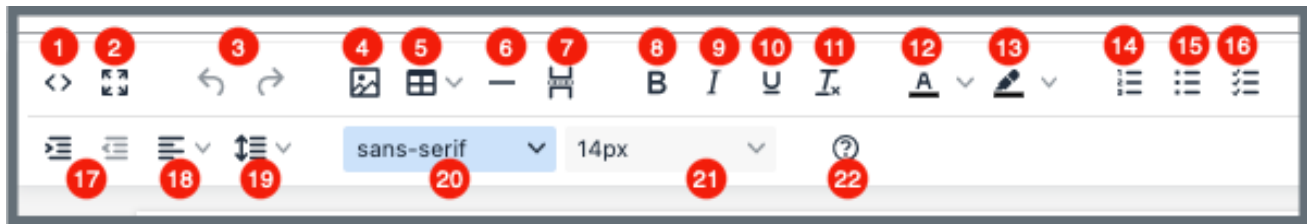
Each provider, survey, intake, or enforcement area has area-appropriate textholders. Provider Textholders are listed below.

Provider Textholders		
Accrediting Organization (AO)	Custom Text Prompt	Provider Mailing Address
Admin 1 st Name	Letter Sent Date	Provider State
Admin Full Name	Medicaid ID Number	Provider State ID (FACID)
Admin Last Name	Provider Address 1 (Street)	Provider State License Number
Admin Salutation	Provider Address 2	Provider Telephone
Admin Short with Salutation	Provider CCN	Provider Type Abbrev
Admin Title	Provider City	Provider Type Full Description
Administrator Email	Provider Doing Business As	Provider Zip
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
Accrediting Organization (AO)	Custom Text Prompt	Provider Mailing Address

Appendix B: Tips and Tricks for Working in a Template

The letters template is very similar to working in Google Docs or Microsoft Word. Here are a few tips and tricks to help:

Template Menu



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

- | | |
|---|---|
| 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 |