



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

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

Version 2.3

February 20, 2026

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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*.

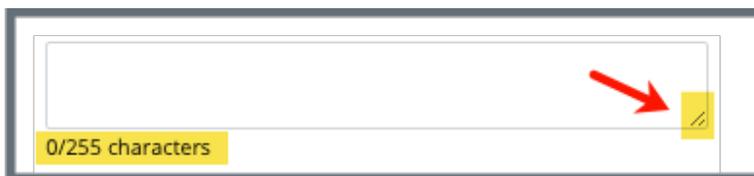


Figure 1: Expandable Field

- 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.

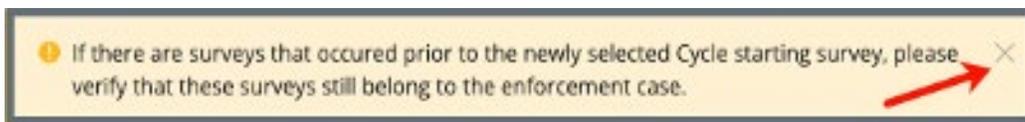


Figure 2: Notification Banner

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*.

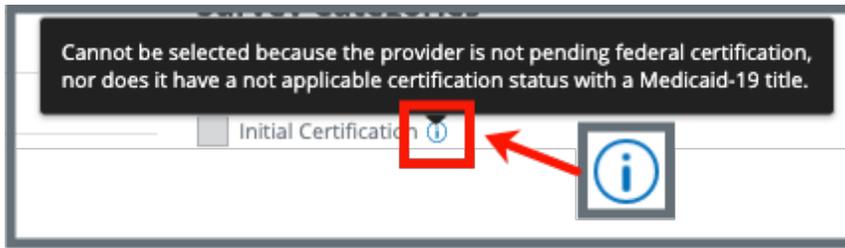


Figure 3: Tool Tip Icon

- 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 it is possible to 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.

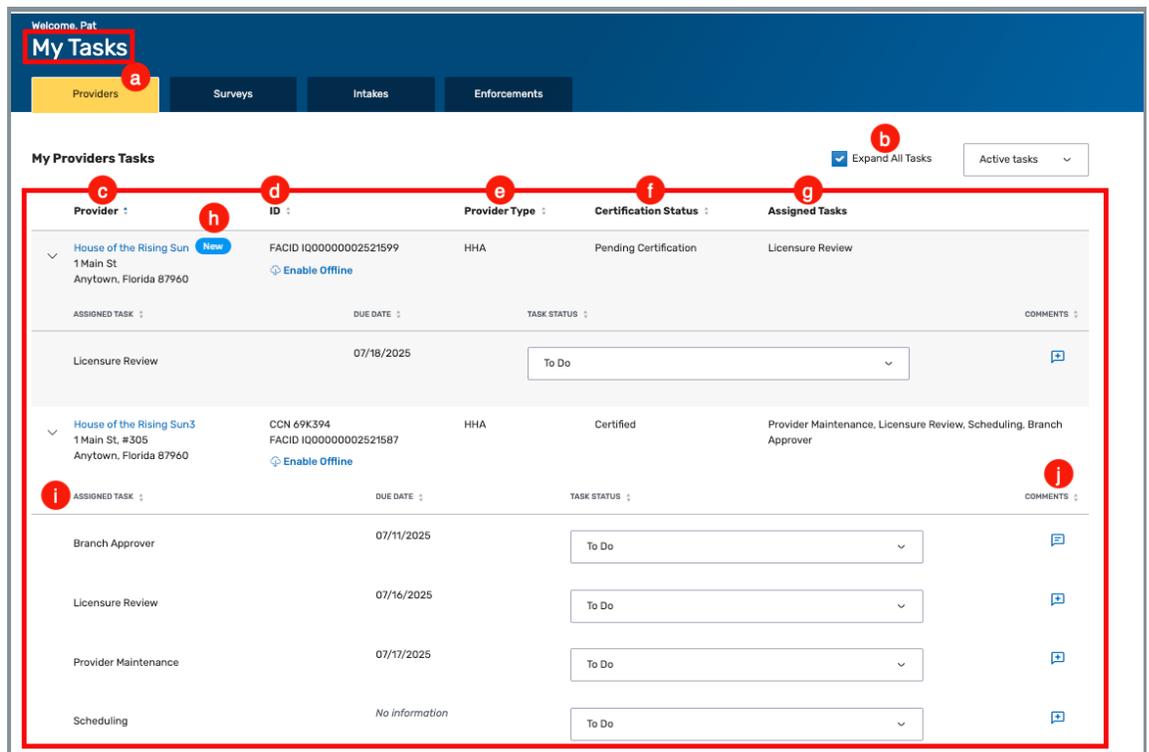


Figure 5: My Tasks Landing Page

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.

- 1.4.2 Click **My Tasks** under **Survey & Certification** on the top menu to access My Tasks at any time. See *Figure 6, My Tasks Login*. **My Tasks** landing page opens.

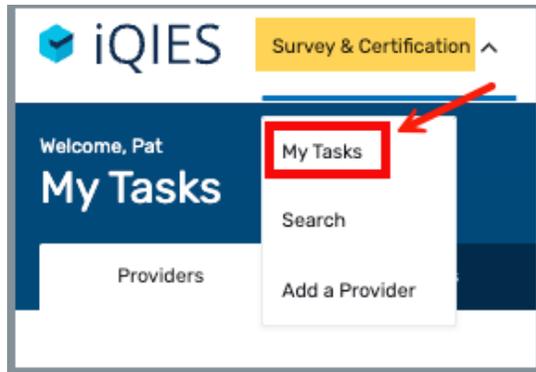


Figure 6: My Tasks Login

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 7, iQIES Logo*.



Figure 7: iQIES Logo

- A message appears below the selected tab when there are no tasks. See *Figure 8, No Active Tasks*, for an example from the **Providers** tab.

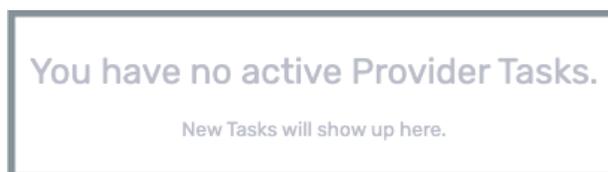


Figure 8: No Active Tasks

1.4.3 Task Detail: Tasks are shown by default. See *Figure 9, Task Status Details* and *Table 3, Task Status Details Detailed Callout*.

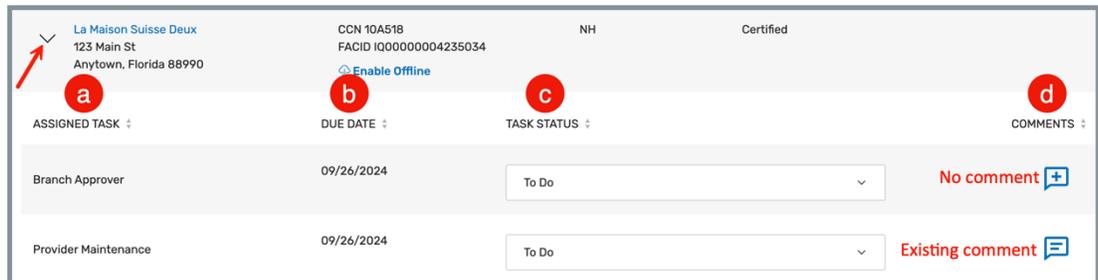


Figure 9: Task Status Details

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 .

1.4.4 **Comments:** Click the **+** to leave a comment. The side menu opens. See *Figure 10, My Tasks Comments*.

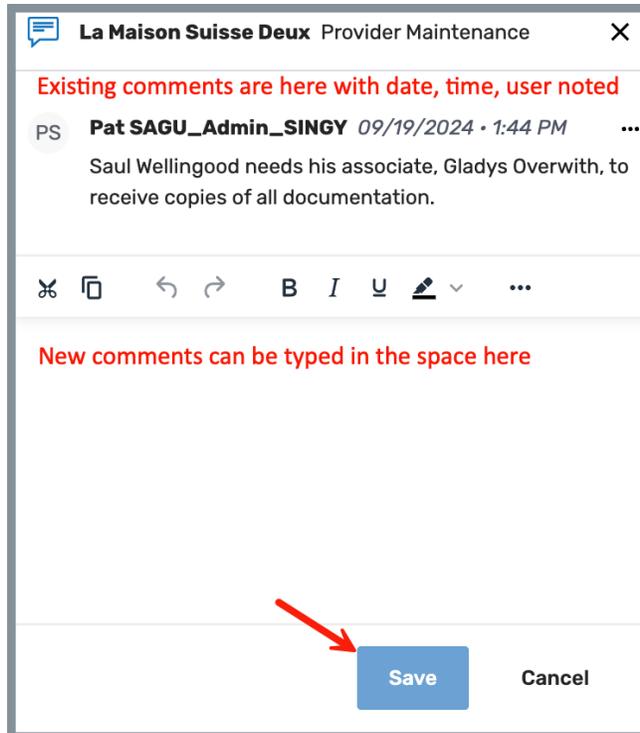


Figure 10: My Tasks Comments

1.4.5 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 Ambulatory Surgical Centers (ASC), Comprehensive Outpatient Rehabilitation Facilities (CORF), End Stage Renal Disease Centers (ESRD), Home Health Agencies (HHA), Hospice, Intermediate Care Facilities for Individuals with Intellectual Disabilities (ICF/IID), Nursing Homes, Organ Procurement Organizations (OPO), and Outpatient Physical Therapy/Speech Language Pathology (OPT/SLP) 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 11, S&C Search*.

Note: The **Providers** tab is the default landing tab.

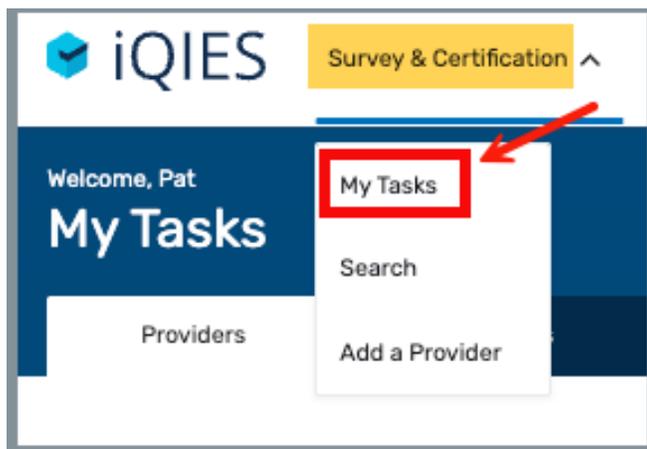
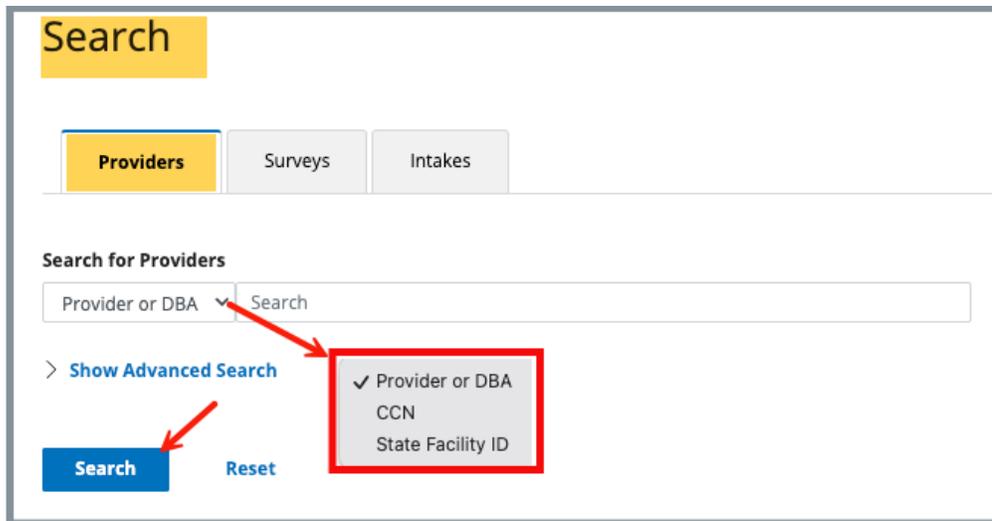


Figure 11: S&C Search

- 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 12, Search*



The screenshot shows a web interface titled "Search". At the top, there are three tabs: "Providers" (highlighted in yellow), "Surveys", and "Intakes". Below the tabs, there is a section titled "Search for Providers". This section contains a search input field with a dropdown menu currently set to "Provider or DBA". To the right of the input field is a "Search" button. Below the input field, there is a link that says "> Show Advanced Search". At the bottom left of the search section is a blue "Search" button, and to its right is a "Reset" link. A red box highlights the dropdown menu options: "Provider or DBA" (with a checkmark), "CCN", and "State Facility ID". A red arrow points from the dropdown menu to the blue "Search" button.

Figure 12: Search

- 3.4** Type search criteria.
- 3.5** Click **Search**. The provider information shows below. See *Figure 13, 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 13: 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 14, 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	Progress	Actions
CMS-1539	Complete	EDDA1-H1	03/29/2023	01/31/2024	EDDA1	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100%	Form action
CMS-1572	Complete	EDDA1-H1	01/31/2024	01/31/2024	EDDA1	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100%	Form action
CMS-1572	Complete	15A11A-H1	08/29/2023	01/31/2024	15A11A	<div style="width: 0%;"><div style="width: 0%;"></div></div> 0%	Form action

View All Forms (18)

Recent Surveys

Add Survey

Sets & Survey ID	Survey Type	Survey Category	Exit Date	Status	Track ID	Progress	Actions
12B715-H1	Health	Validation Survey		Writing in progress	12B715	<div style="width: 0%;"><div style="width: 0%;"></div></div> 0%	
12B714-H1	Health	Recertification, Complaint		Writing in progress	12B714	<div style="width: 0%;"><div style="width: 0%;"></div></div> 0%	
115866-H1	Health	Recertification, Complaint		Writing in progress	115866	<div style="width: 0%;"><div style="width: 0%;"></div></div> 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 14: 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 15, Provider Advanced Search*.

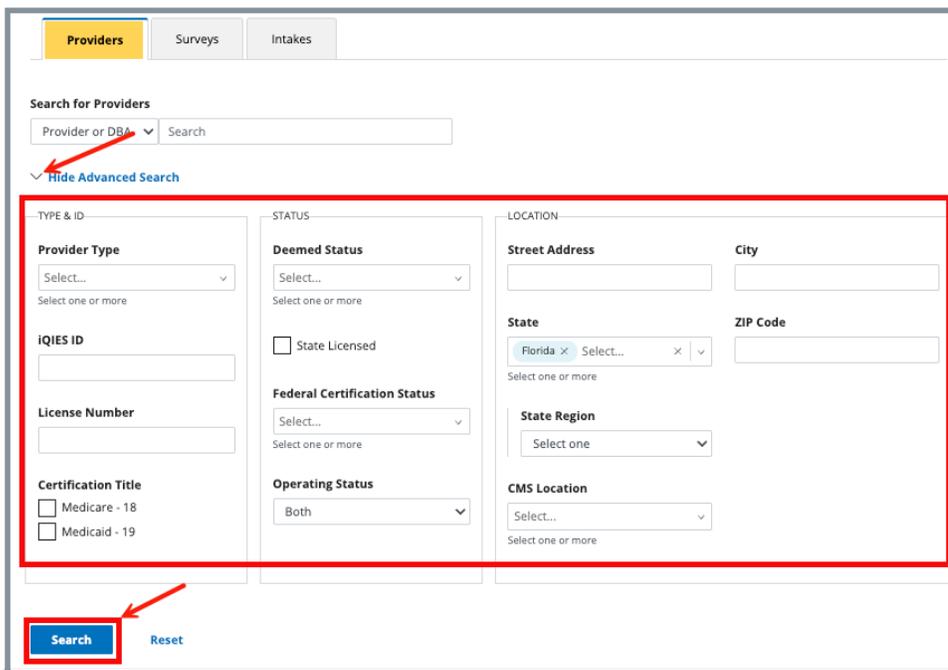


Figure 15: Provider Advanced Search

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

Notes:

- ESRD provider type can be searched by **Provider Subtype**. Select **ESRD** under **Provider Type** and the **Provider Subtype** field opens.
- 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 16, Workload Management Track Status*.

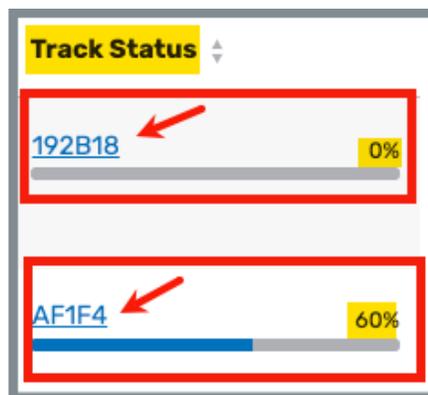


Figure 16: Workload Management Track Status

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 17, Detailed Certification Status*.

Track AF1F4 Status
✕

∨
Survey AF1F4-H1

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

∨
Track Forms

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

→ Close

Figure 17: Detailed Certification Status

4.2 View Certification Progress in Survey

Go to the **Survey Basic Information** page. See *Figure 18, Survey Basic Information Page Certification Progress* and *Table 4, Basic Information Page Certification Progress Callout Details*.

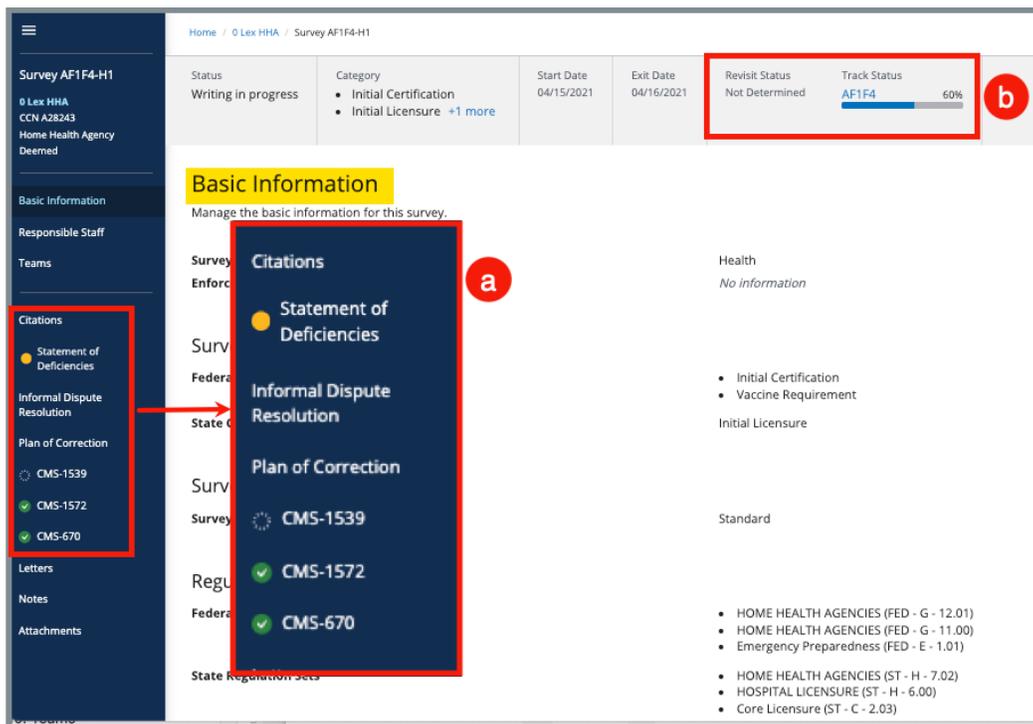


Figure 18: Survey Basic Information Page Certification Progress

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 19, Provider History Page Certification Progress*.

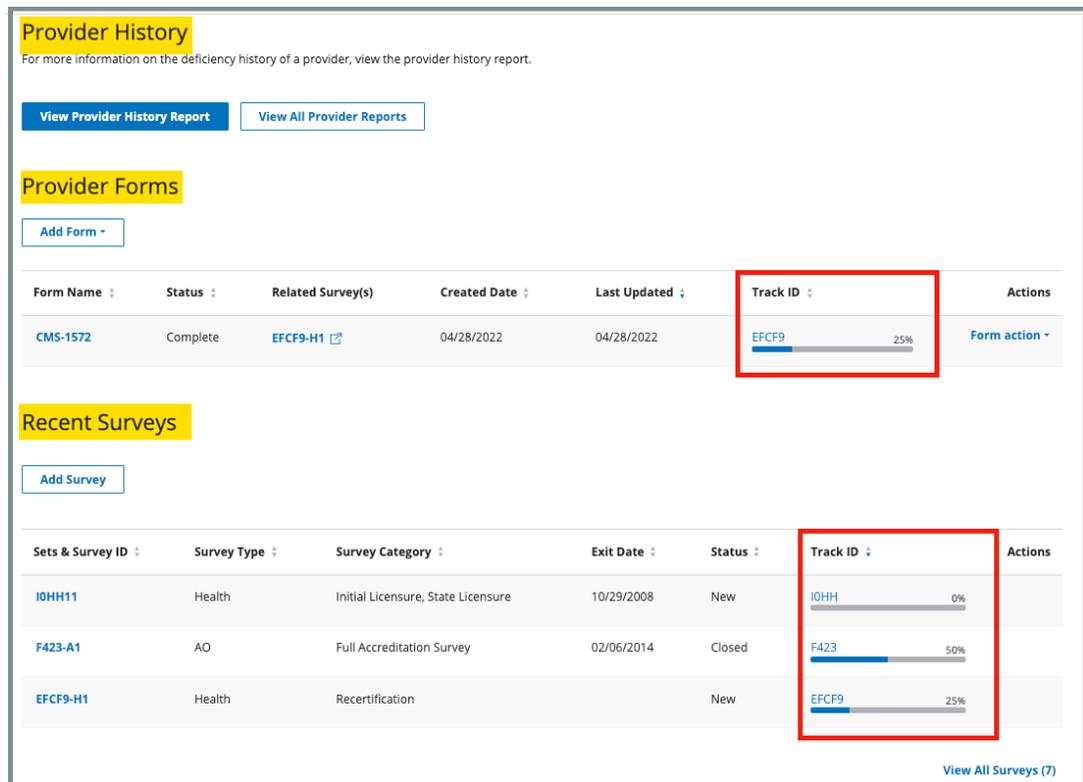


Figure 19: Provider History Page Certification Progress

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 provider **Basic Information** page opens. See *Figure 20, View Details Link*.

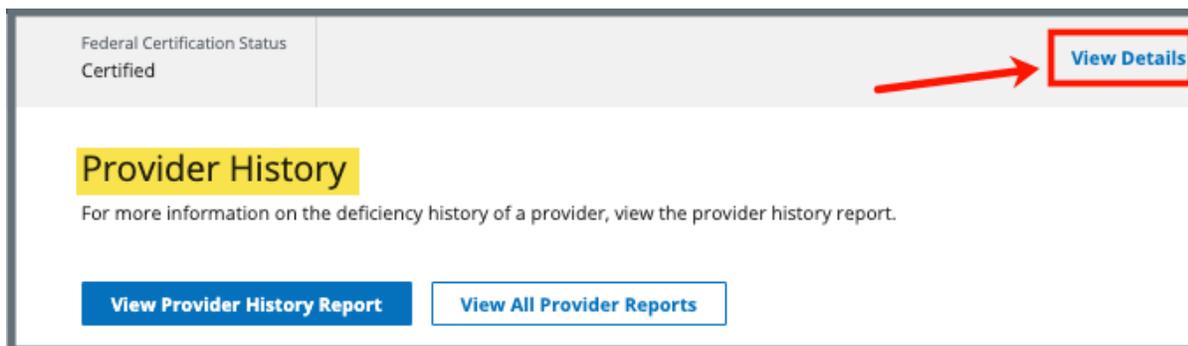


Figure 20: View Details Link

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 21, Provider Basic Information Page*.

Note: The left menu varies by provider type. The [Provider Basic Information Page figure](#) below shows the left menu for an HHA provider. these are the provider attributes that are provider specific:

HHA:	Additional Branch Addresses
ASC:	Locations
CORF:	Extension Locations
ESRD:	Modalities Waivers
Hospice:	Inpatient Locations Multiple Locations
Nursing Homes	Buildings/Wings Performance Bed Summaries
OPT/SLP:	Extension Locations

Notes:

- Both a **Tier** and a **Donation Service Area** must be assigned when transitioning OPO provider types from the legacy system. Click **Edit** to update provider details.
- **Services Provided** is for the OPT/SLP provider type only.

The screenshot displays the 'Provider Basic Information' page. On the left, a dark blue sidebar contains a menu with the following items: 'Basic Information' (highlighted with a red box), 'Responsible Staff', 'Manage Tasks', 'Mailing Address', 'Extension Locations', 'Operating and Ownership', 'Additional Contacts', 'Certification', 'Licensure', 'Deeming Information', 'Administrators', 'Letters', 'Notes', and 'Attachments'. A red arrow points to the '< Return to Provider' link in the sidebar. The main content area has a header with 'Federal Certification Status' (Certified) and 'Title' (Medicare - 18). Below this is a yellow 'Basic Information' section with an 'Edit' button. The 'Overview' section lists the following details:

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

Figure 21: Provider Basic Information Page

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

6. Add a Provider

Notes:

- New providers are automatically set to **Pending Certification** status.
- Review information in the [Certification and Licensure](#) section to certify a new provider, if necessary.
- It is not possible to add new OPO providers. Contact the [Service Center](#) if a new provider needs to be added.

- 6.1 Click **Add a Provider** from the **Survey & Certification** drop-down menu to add a new provider. See *Figure 22, Add a Provider*. The **Add a Provider** window opens.

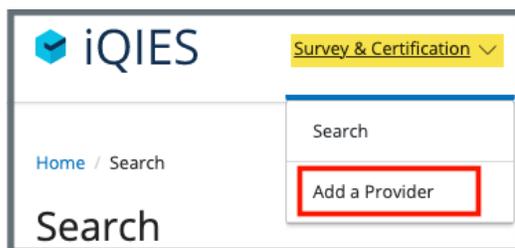


Figure 22: Add a Provider

- 6.2 Fill out the information. See *Figure 23, 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.
- The system automatically selects a Network ID for ESRD based on the provider's state.

- **OPO** provider types must select a **Tier (Tier 1, Tier 2, or Tier 3)** to add a provider.

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.
- ESRD provider types require a **Provider Subtype**. When **ESRD** is selected under **Provider Type**, a **Provider Subtype** field opens with a list of facilities from which to choose. See *Figure 24, ESRD Provider Subtype*.

The screenshot shows a form with two main sections. The first section, titled 'Provider Type *', contains a dropdown menu with 'ESRD' selected, indicated by a red arrow. Below this are fields for 'Primary Practice Location', 'Address 1 *', and 'Address 2'. The second section, titled 'Provider Subtype *', is a dropdown menu that is open, showing a list of options: 'Select one', 'Hospital-Based Renal Dialysis Facility', 'Independent Renal Dialysis Facility', 'Independent Special Purpose Renal Dialysis Facility', 'Satellite Renal Dialysis Facility', and 'Hospital-Based Special Purpose Renal Dialysis Facility'. A red box highlights the list of options.

Figure 23: ESRD Provider Subtype

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

Figure 24: 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 25, Hospice Provider Basic Information Edit Page*. The **Basic Information** edit page opens.



Figure 25: Hospice Provider Basic Information Edit Page

7.2 Click the **Yes** or **No** radio button under **Inpatient Care Provided**. See *Figure 26, Inpatient Care Provided Radio Buttons*.

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

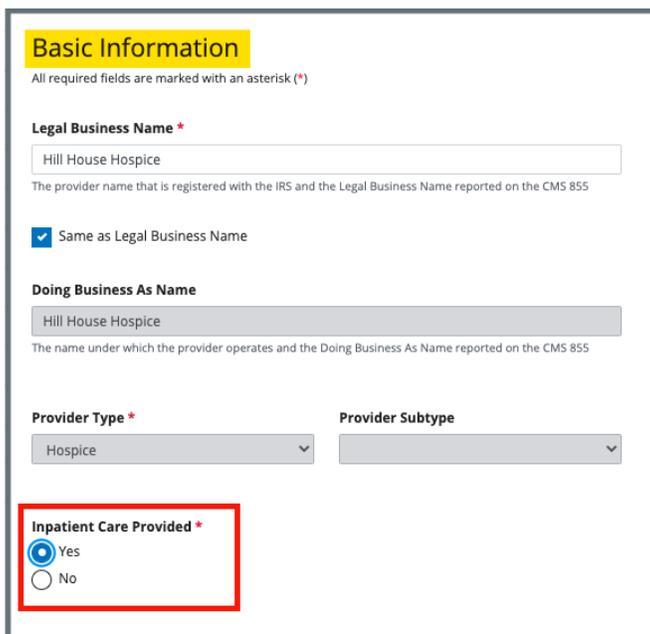


Figure 26: Inpatient Care Provided Radio Buttons

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 27, Inpatient Locations*. The **Inpatient Locations** page opens.

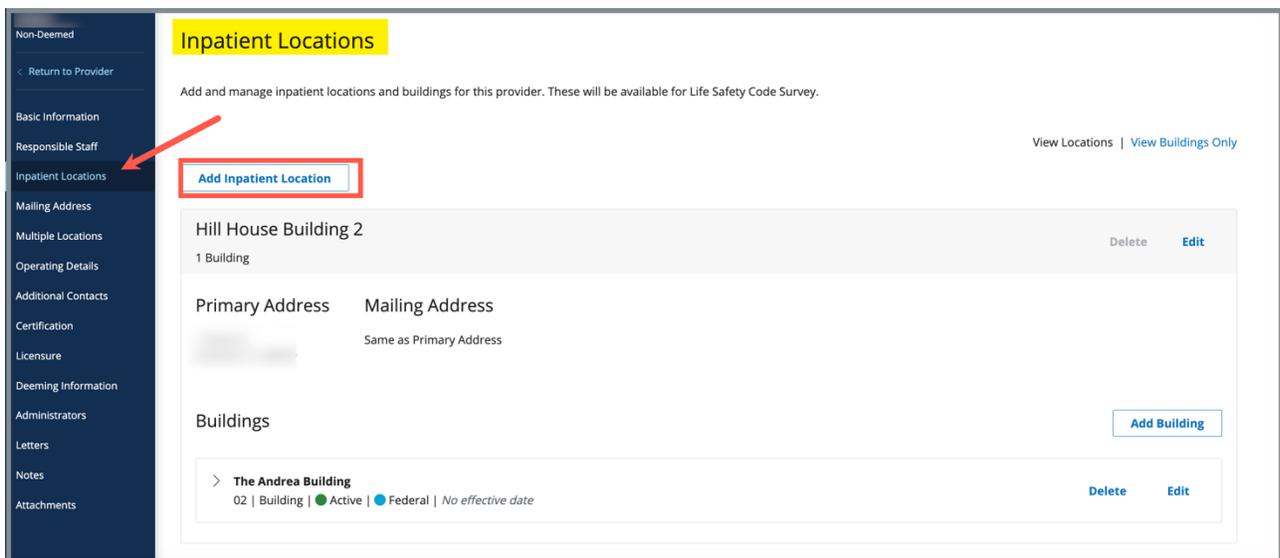


Figure 27: Inpatient Locations

8.2 Click **Add Inpatient Location**. The **Inpatient Location** fields open below. See *Figure 28, 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 *

500 characters

Location Primary Address

Address 1 * **Address 2**

City * **State *** **ZIP Code ***

Location Mailing Address

Location Mailing Address is the same as Primary

Figure 28: Inpatient Locations Fields

- 8.3** Fill out the information.
- 8.4** Click **Save**. The **Inpatient Locations** page populates with the new location. See *Figure 29, Inpatient Locations Information*.

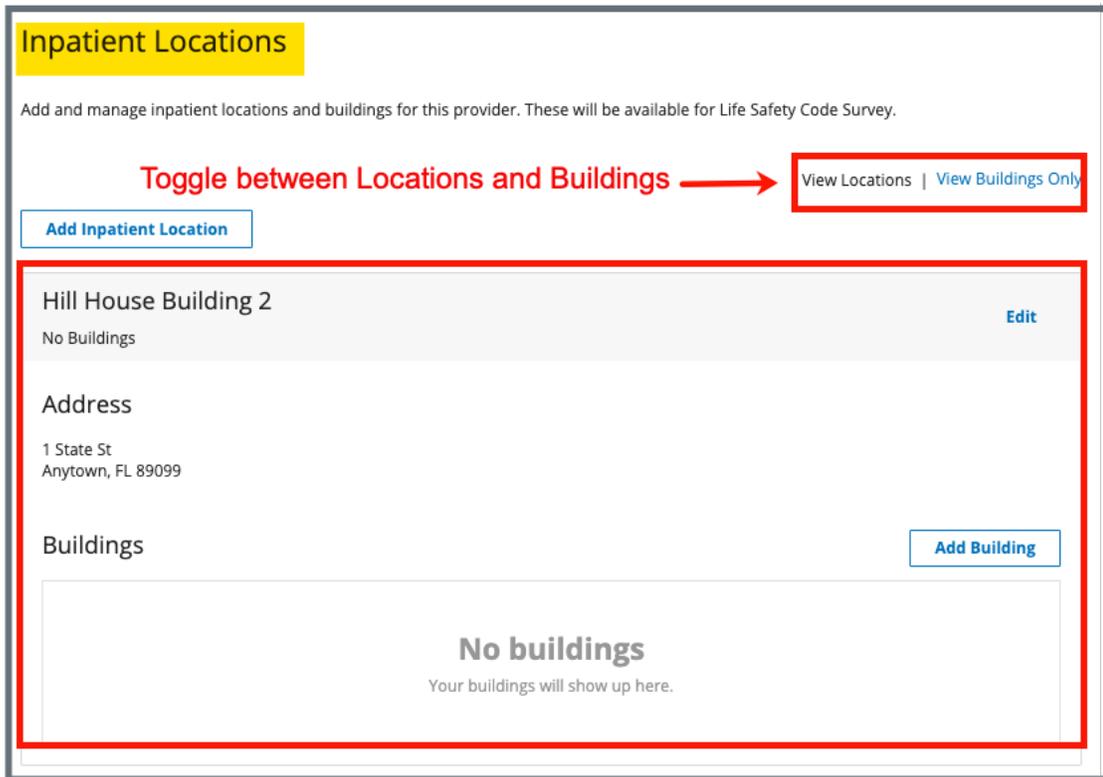


Figure 29: Inpatient Locations Information

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 30, Inpatient Locations Building*.

Hill House Building 2 Edit

No Buildings

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 * 500 characters **Building Licensure** State Licensed Only

Building ID * Limit 2 characters **Type *** **Number of Stories**

Plan Approval Date **Effective Date** **Closed Date**
MM/DD/YYYY MM/DD/YYYY MM/DD/YYYY

Construction Type **Construction Date**
MM/DD/YYYY

LSC Form Indicator *

Regulation Set
FED - K - 03.02

Hazmat Area Separate **FSES Date**
MM/DD/YYYY

Sprinkler Status **Sprinkler Required**

Building Location Detail

Additional details such as landmarks, directions, etc.

Figure 30: Inpatient Locations Building

8.6 Click **Save**. The **Inpatient Locations** page populates with the new building information. See *Figure 31, Inpatient Locations Buildings Information*.

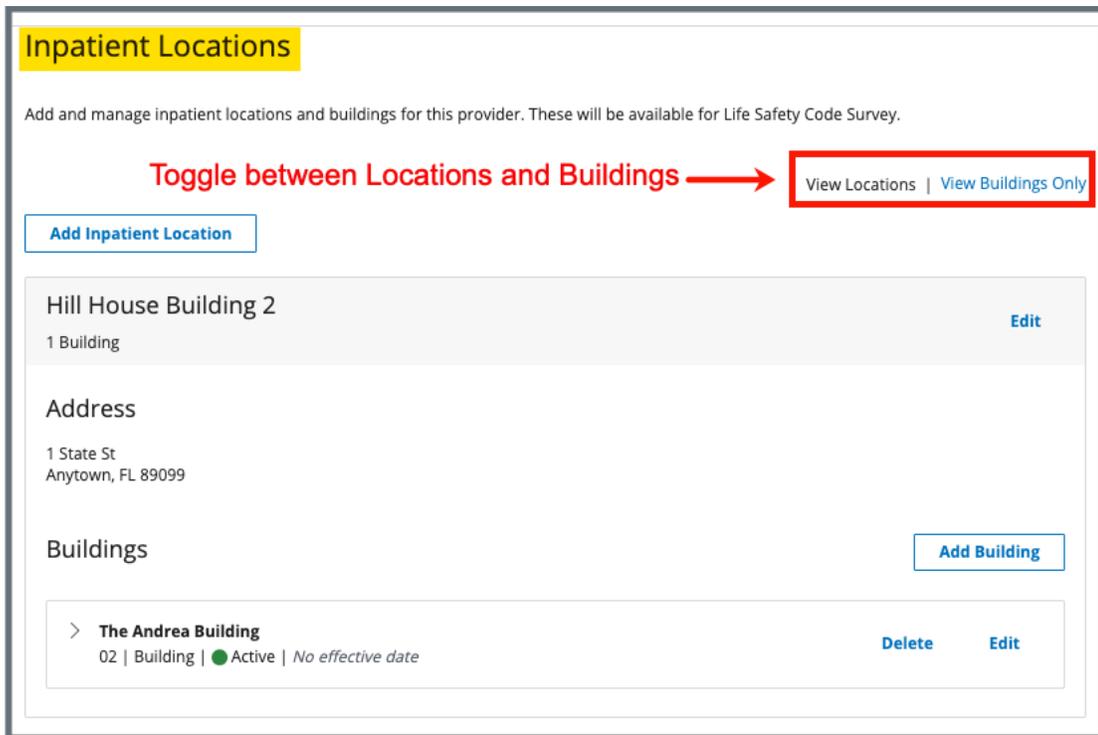


Figure 31: Inpatient Locations Buildings Information

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 32, 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

Management Unit

Work Unit

Figure 32: 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 33, Delete a Responsible Staff*.

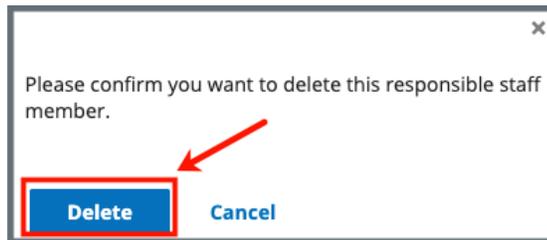


Figure 33: Delete a Responsible Staff

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 34, Manage Tasks* and *Table 5, Manage Tasks Detailed Callout*.

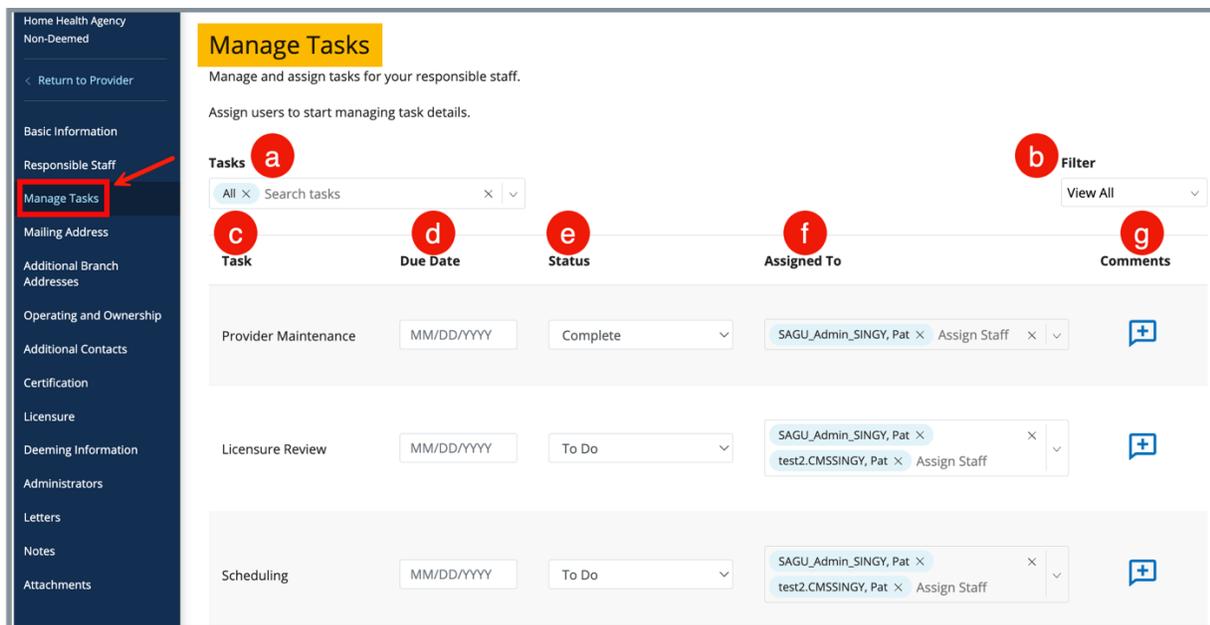


Figure 34: Manage Tasks

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 and ICF/IID provider types only.

11.1 View Buildings and Wings

Click **Buildings/Wings** on the left menu. See *Figure 35, Buildings/Wings*. The **Buildings/Wings** page opens.

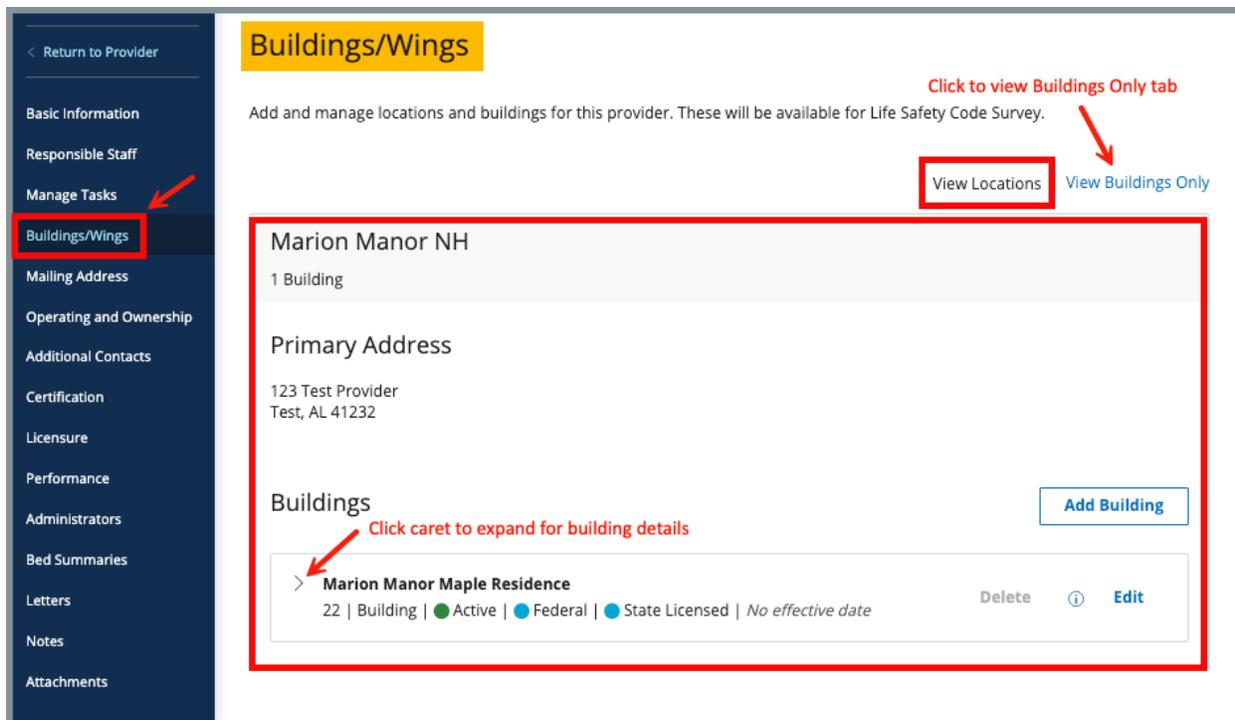


Figure 35: Buildings/Wings

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 36, 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** Delete ⓘ

22 | Building | ● Active | ● Federal | ● State Licensed | *No effective date* |

Marion Manor NH Edit

Closed Buildings

No Buildings

No buildings

Your buildings will show up here.

Figure 36: 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 37, Add New Building*.

The screenshot shows a web form for adding a new building. At the top right, there is a yellow 'Buildings' tab and an 'Add Building' button. Below the tab, a message states: 'All required fields are marked with an asterisk. (*)'. The form fields are as follows:

- Parent Location ***: A dropdown menu with 'Marion Manor NH' selected.
- Building Name ***: A text input field with a '500 characters' limit.
- Building Licensure**: A checkbox labeled 'State Licensed'.
- Building ID ***: A text input field with a 'Limit 2 characters' limit.
- Type ***: A dropdown menu with 'Select one'.
- Number of Stories**: A text input field.
- Plan Approval Date**: A date input field with 'MM/DD/YYYY' format.
- Effective Date**: A date input field with 'MM/DD/YYYY' format.
- Closed Date**: A date input field with 'MM/DD/YYYY' format.
- Construction Type**: A dropdown menu with 'Select one'.
- Construction Date**: A date input field with 'MM/DD/YYYY' format.
- Federal LSC Form Indicator ***: A dropdown menu with 'Select one'.
- Regulation Set**: A greyed-out text area.
- State LSC Form Indicator ***: A dropdown menu with 'Select one'.
- Regulation Set**: A greyed-out text area.
- Hazmat Area Separate**: A dropdown menu with 'Select one'.
- FSES Date**: A date input field with 'MM/DD/YYYY' format.
- Sprinkler Status**: A dropdown menu with 'Select one'.
- Sprinkler Required**: A dropdown menu with 'Select one'.
- Building Location Detail**: A large text area for 'Additional details such as landmarks, directions, etc.' with a small icon in the bottom right corner.

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

Figure 37: 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 38, New Building Information*.

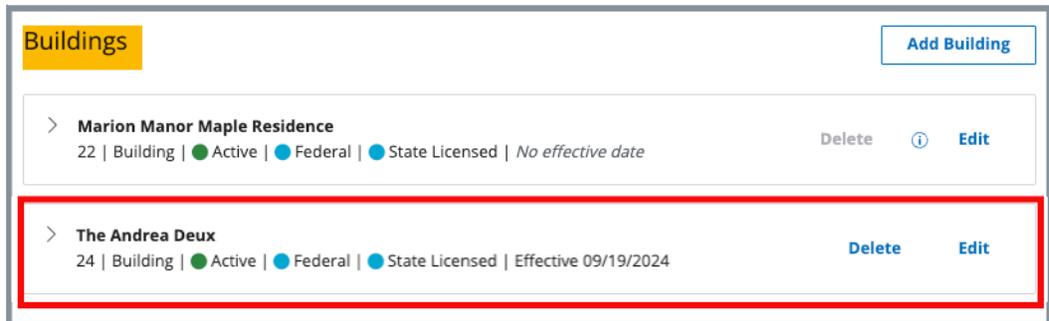


Figure 38: New Buildings Information

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 39, Delete Building Pop-up Window*.

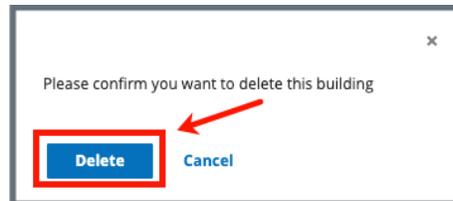


Figure 39: Delete Building Pop-up Window

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

11.4 Edit a Building

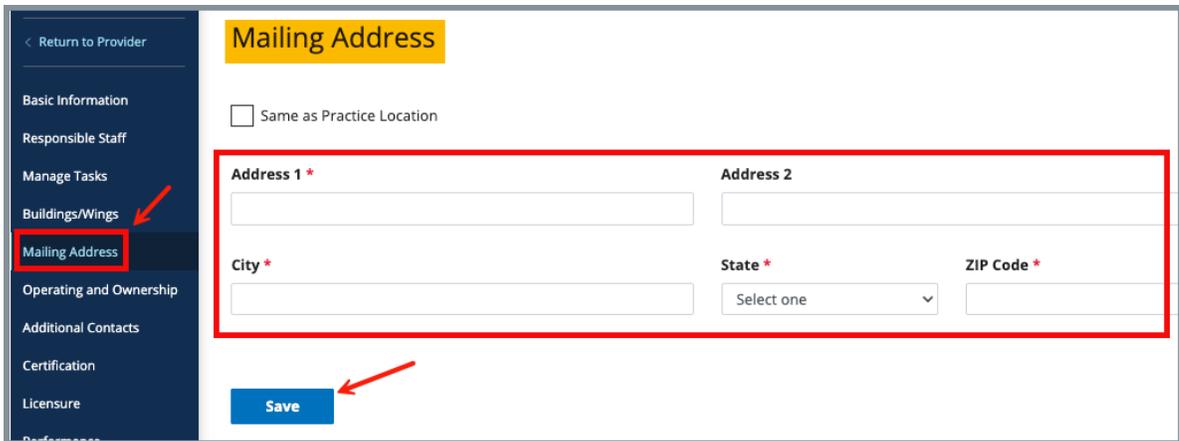
11.4.1 Click **Edit** next to the building that needs to be edited. The current building information populates below **Buildings** and can be edited.

11.4.2 Click **Save**.

12. Mailing Address

12.1 Add a new mailing address

12.1.1 Click **Mailing Address** on the **Provider Basic Information page**. See *Figure 40, Provider Mailing Address*. The **Mailing Address** window opens.



The screenshot shows the 'Mailing Address' form. On the left is a dark blue sidebar with a navigation menu containing: '< Return to Provider', 'Basic Information', 'Responsible Staff', 'Manage Tasks', 'Buildings/Wings', 'Mailing Address' (highlighted with a red box and a red arrow), 'Operating and Ownership', 'Additional Contacts', 'Certification', 'Licensure', and 'Performance'. The main content area has a yellow header 'Mailing Address' and a checkbox 'Same as Practice Location'. Below this is a red-bordered form with fields for 'Address 1 *', 'Address 2', 'City *', 'State *' (a dropdown menu with 'Select one'), and 'ZIP Code *'. A blue 'Save' button is at the bottom left, with a red arrow pointing to it.

Figure 40: 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 Basic Information page**. The **Mailing Address** window opens

12.2.2 Click **Edit**. See *Figure 41, Edit Mailing Address*.

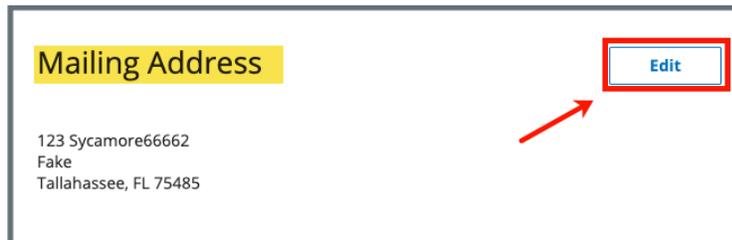


Figure 41: Edit Mailing Address

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 Basic Information** page. See *Figure 42, Locations*. The **Locations** window opens.

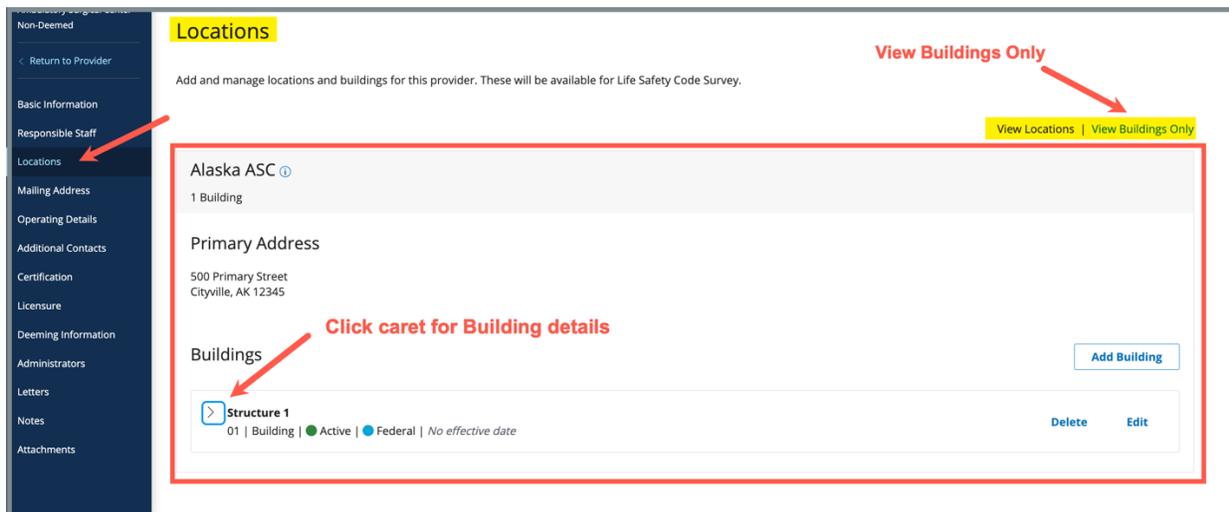


Figure 42: Locations

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 43, New Building*.

The screenshot shows a web interface for adding a new building. At the top, there is a 'Buildings' tab and an 'Add Building' button. Below this is a 'New Building' window with a close button (X). A note states: 'All required fields are marked with an asterisk. (*)'. The form contains the following fields:

- Parent Location:** A dropdown menu showing 'Andrea's All-Inclusive ASC'.
- Building Name *:** A text input field with a '500 characters' limit.
- Building Licensure:** A checkbox labeled 'State Licensed Only'.
- Building ID *:** A text input field with a 'Limit 2 characters' limit.
- Type *:** A dropdown menu with 'Select one'.
- Number of Stories:** A text input field.
- Plan Approval Date:** A date input field with format 'MM/DD/YYYY'.
- Effective Date:** A date input field with format 'MM/DD/YYYY'.
- Closed Date:** A date input field with format 'MM/DD/YYYY'.
- Construction Type:** A dropdown menu with 'Select one'.
- Construction Date:** A date input field with format 'MM/DD/YYYY'.
- LSC Form Indicator *:** A dropdown menu with 'Select one'.
- Regulation Set:** A dropdown menu.
- Hazmat Area Separate:** A dropdown menu with 'Select one'.
- FSES Date:** A date input field with format 'MM/DD/YYYY'.
- Sprinkler Status:** A dropdown menu with 'Select one'.
- Sprinkler Required:** A dropdown menu with 'Select one'.
- Building Location Detail:** A text area for 'Additional details such as landmarks, directions, etc.'.

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

Figure 43: 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 44, New Building Information*.



Figure 44: 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 45, Delete Building Pop-up Window*.

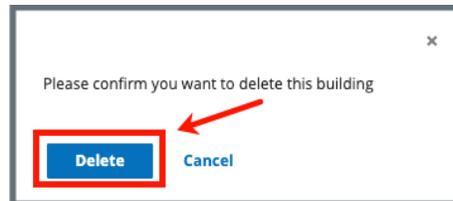


Figure 45: Delete Building Pop-up Window

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 Basic Information** page. See *Figure 46, Multiple Locations*. The **Locations** window opens.

Figure 46: 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 47, Multiple Locations Information*.

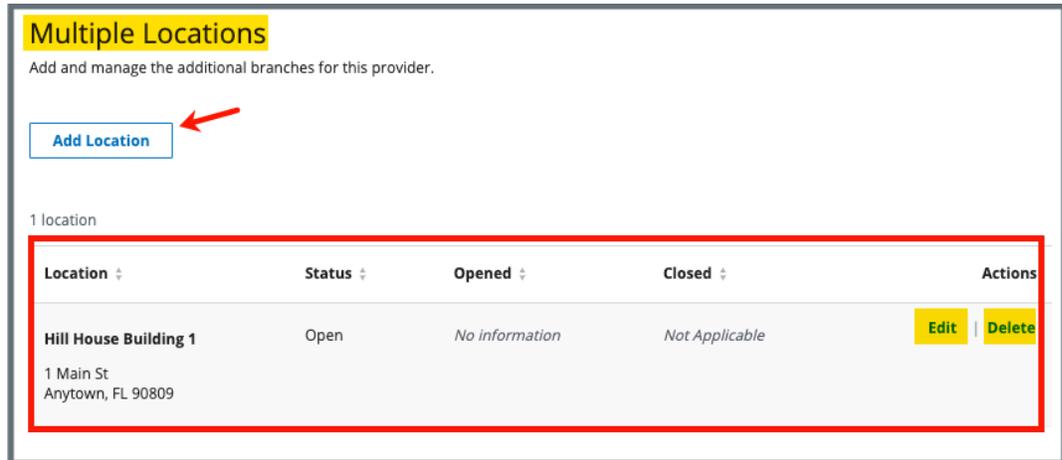


Figure 47: Multiple Locations Information

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 48, Delete Location Pop-up Window*.

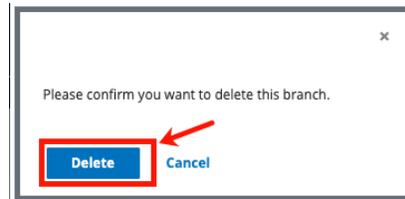


Figure 48: Delete Location Pop-up Window

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 49, 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 49: 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 Basic Information** page. See *Figure 50, Provider Additional Branch Addresses*. The **Add Branch** window opens if there are no existing additional branches. If there are existing branches, click **Add Branch**.

Figure 50: 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. Extension Locations

Note: Extension Locations is enabled for the CORF and OPT/SLP provider types only.

16.1 Click **Extension Locations** on the **Provider Basic Information** page. See *Figure 51, Extension Locations*.

Note: The **Add Extension Location** window opens the first time an extension location is added. Otherwise, the **Extension Location** window opens with a link to add an extension location. See [Extension Location with Locations](#).

The screenshot shows the 'Add Extension Location' form. On the left is a dark blue sidebar with navigation links: 'Return to Provider', 'Basic Information', 'Responsible Staff', 'Manage Tasks', 'Mailing Address', 'Extension Locations' (highlighted with a red box and arrow), 'Operating and Ownership', 'Additional Contacts', 'Certification', 'Licensure', 'Deeming Information', 'Administrators', 'Letters', 'Notes', and 'Attachments'. The main form area has a yellow header 'Add Extension Location' and a note: 'All required fields are marked with an asterisk (*)'. The form fields include:

- Extension Location Name ***: Text input with 'Singy Motion Commotion PT'.
- Medicare Extension Location ID**: Text input with a note 'Automatically generated upon save if the provider is certified'.
- Extension Location Status**: Radio button for 'Open'.
- Open Date**: Text input with a date format 'MM/DD/YYYY'.
- Services Provided ***: Check all that apply. Includes checkboxes for 'Physical Therapy', 'Speech Pathology', and 'Occupational Therapy'.
- Hours of Operation**: Check one. Includes radio buttons for 'Full-Time' and 'Part-Time'.
- Extension Location Address**:
 - Address 1 ***: Text input.
 - Address 2**: Text input.
 - City ***: Text input.
 - State ***: Dropdown menu with 'Select one'.
 - ZIP Code ***: Text input.
 - County**: Text input.

 A red arrow points to the 'Save' button at the bottom of the form.

Figure 51: Extension Locations

16.2 Fill out the information.

16.3 Click **Save**. The **Extension Locations** window opens with details on the location. See *Figure 52, Extension Location with Locations*.

Notes:

- The **Medicare Extension Location ID** is automatically generated when the provider is certified.
- Click **Add Extension Location** to add additional locations.
- Click **Edit** to update any extension location information.

Extension Locations
Add and manage the extension locations for this provider.

[Add Extension Location](#)

1 extension location

Extension Locations ⌵	Status ⌵	Opened ⌵	Closed ⌵	Actions
Singy Water Sports Rehab Facility Medicare Extension Location ID 68B4896001 234 5th Street FLEMING ISLAND, FL 32003	Open	01/09/2026	Not Applicable	Edit

Figure 52: Extension Location with Locations

17. Modalities

Note: Modalities is enabled for the ESRD provider type only.

17.1 Click **Modalities** on the left menu of the **Provider Basic Information** page. See *Figure 53, Locations*. The **Modalities** window opens.

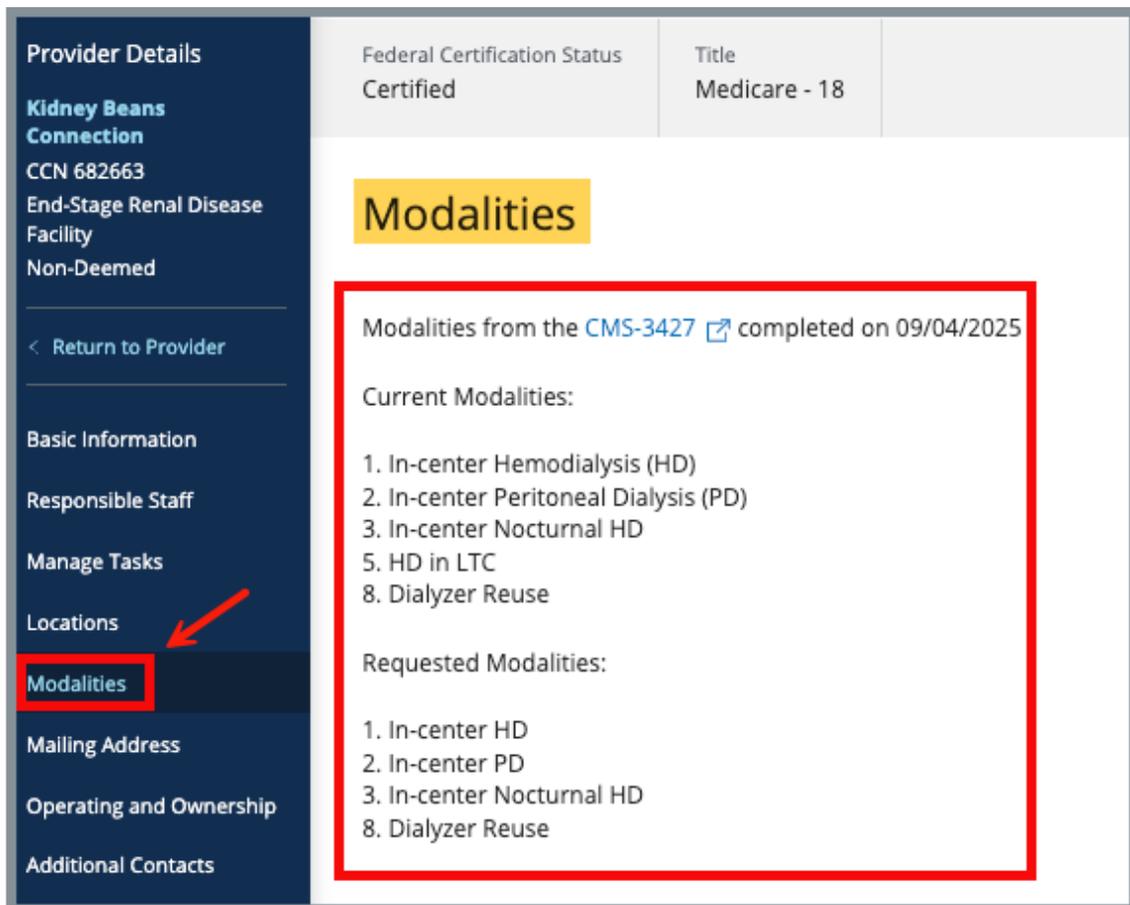


Figure 53: Modalities

17.2 Click **CMS-3427** to view the CMS-3427 form. The form opens in a separate tab.

Note: Modality information found on this page is taken from the most recent completed CMS-3427 form.

18. Operating and Ownership

18.1 Operating Details

18.1.1 Click **Operating and Ownership** on the **Provider Basic Information** page. See *Figure 54, 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 54: Provider Operating Details

18.1.2 Click **Edit** to make any updates. The editable **Operating Details** page opens.

Notes:

- ESRD provider types show temporary closure reasons, start and stop dates
- ESRD provider types show information from the most recently completed CMS-3427 form.

18.1.3 Update information as needed.

18.1.4 Click **Save**. The **Operating Details** page opens, and the updated information is shown.

18.2 Provider Conversion

Note: Provider Conversion is only for an OPT/SLP provider conversion to a CORF provider.

18.2.1 Click **Edit** on the **Operating Details** page. The editable **Operating Details** page opens.

18.2.2 Click **Find Facility**. See *Figure 55, Find CORF Provider for Conversion*. The **Select the CORF Provider for Conversion** pop-up window opens.

The screenshot shows the 'Operating Details' form with the following fields and controls:

- Operating Status:** A dropdown menu currently set to 'Open'.
- Date Opened:** A date input field with the format MM/DD/YYYY.
- Date Closed:** A date input field with the format MM/DD/YYYY.
- Insurance Expiration Date:** A date input field with the format MM/DD/YYYY.
- Fiscal Year Ending Month:** A dropdown menu with 'Select one' as the current selection.
- Special Hours of Operations:** A checkbox with the label 'Special Hours of Operations' and a sub-label 'Indicator that the provider has non-standard operating hours'.
- Bankrupt:** A checkbox with the label 'Bankrupt' and a sub-label 'Indicator that the provider has filed for bankruptcy'.
- Bankruptcy Petition Date:** A date input field with the format MM/DD/YYYY.
- Bankruptcy End Date:** A date input field with the format MM/DD/YYYY.
- Provider Conversion to:** A text input field with a help icon (i) to its right.
- Find Facility:** A blue button with a red arrow pointing to it.
- Save:** A grey button.
- Cancel:** A blue button.

Figure 55: Find CORF Provider for Conversion

18.2.3 Search for a provider by Provider name, DBA, CCN, or State Facility ID.

18.2.4 Select the radio button next to the CORF provider. See *Figure 56, Select CORF Provider for Conversion*.

Select the CORF Provider for Conversion

Search for Provider

FL Provider or DBA Water Search

1 Provider

Provider	ID	Provider Type	Deemed Status
<input checked="" type="radio"/> Singy Water Sports Rehab Facility	CCN 684896 FACID FLSWSRF123	CORF	Non-Deemed

Submit Cancel

Figure 56: Select CORF Provider for Conversion

18.2.5 Click **Submit**.

18.2.6 Click **Save**.

18.2.7 Verify **Provider Conversion** is correct in both original provider and converted provider. See *Figure 57, Provider Conversion From OPT/SLP* and *Figure 58, Provider Conversion To CORF*.

Note: **Provider Conversion** is a clickable link.

Home / Search / Singy Water Sports Rehab Facilit... / Provider Details

Federal Certification Status	Title
Certified	Medicare - 18

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
Provider Converted from	Singy Motion Commotion PT (686973)

Figure 57: Provider Conversion From OPT/SLP

Provider Details

Federal Certification Status	Title
Terminated	Medicare - 18

Operating Details

Operating Status	Open
Date Opened	07/25/2025
Date Closed	No information
Insurance Expiration Date	2026-07-25
Fiscal Year End Month	June
Special Operating Hours	No information
Provider Conversion To	Singy Water Sports Rehab Facility (684896)

Figure 58: Provider Conversion To CORF

18.3 Change of Ownership (CHOW)

- 18.3.1 Click **Operating and Ownership** on the **Provider Basic Information page**.
- 18.3.2 Click **Add CHOW Record**. See *Figure 59, Add CHOW Record*. The **Add Change of Ownership** window opens. See *Figure 60, Add Change of Ownership*.



Figure 59: Add CHOW Record

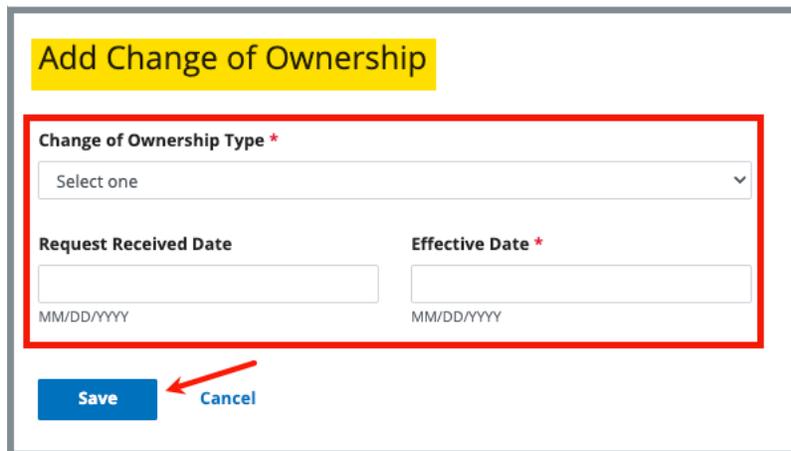


Figure 60: Add Change of Ownership with Assignment

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

- a. Select **With Assignment** (see *Figure 61, 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 61: With 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 **Save**. The **Operating Details/Change of Ownership** window opens.
- d. Verify the CHOW record is correct. See *Figure 62, 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 62: With Assignment CHOW Record

Without Assignment

- a. Select **Without Assignment** (see *Figure 63, Without Assignment*) under **Change of Ownership Type**.

Add Change of Ownership

Change of Ownership Type *
Without Assignment

Request Received Date **Effective Date ***
MM/DD/YYYY MM/DD/YYYY

Previous Provider Name * **Find Facility**

Save **Cancel**

Figure 63: 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 64, Select Related Provider*.

Select Related Provider X

Search for Provider

AL **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 64: 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 65, 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	<i>No information</i>	12/01/2023	Edit

Figure 65: Without Assignment CHOW Record

19. Additional Contacts

Once one additional contact is listed, the **Edit**, **Add Emergency Contact**, and **Add Additional Contact** buttons appear. See *Figure 66, Edit, Add Emergency Contact and Add Additional Contact Buttons*.

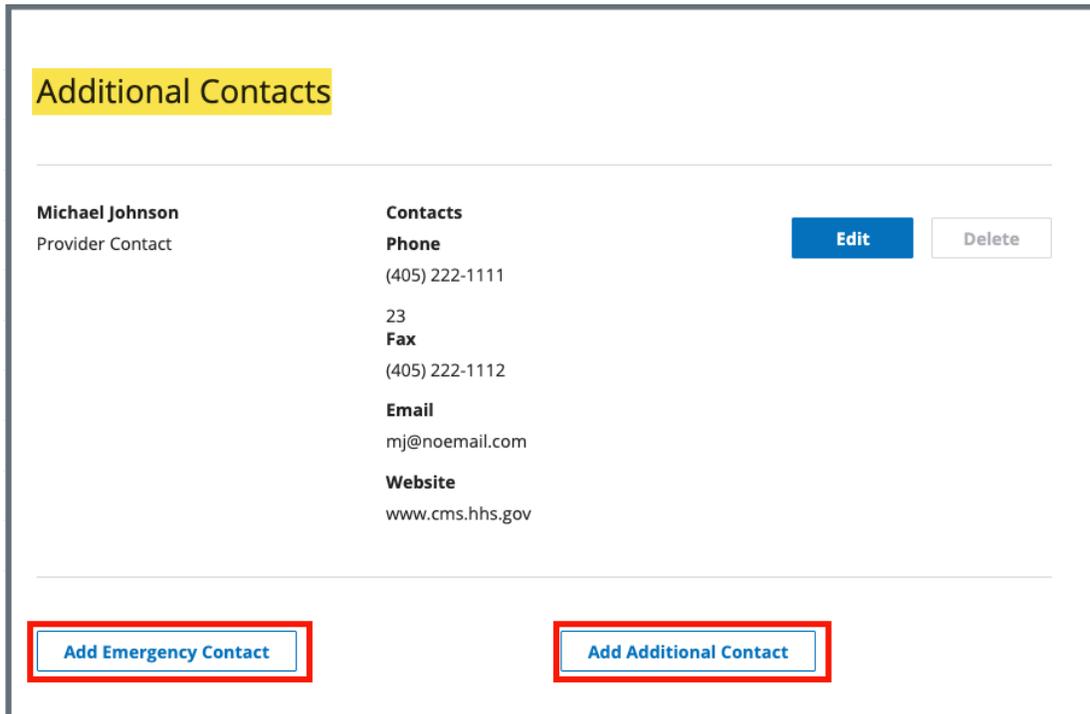


Figure 66: Edit, Add Emergency Contact and Add Additional Contact Buttons

19.1 Add First Additional Contact

- 19.1.1 Click **Additional Contacts** on the **Provider Basic Information** page. See *Figure 67, Provider Additional Contacts*. The **Additional Contacts** window opens.

The screenshot shows the 'Additional Contacts' form. On the left is a dark blue sidebar with a list of menu items: 'Return to Provider', 'Basic Information', 'Responsible Staff', 'Manage Tasks', 'Buildings/Wings', 'Mailing Address', 'Operating and Ownership', 'Additional Contacts' (highlighted with a red box and a red arrow), 'Certification', 'Licensure', 'Performance', and 'Administrators'. The main content area has a yellow header 'Additional Contacts' and a note: 'All fields are optional. Complete at least one field to save.' Below this are several input fields: 'Contact Name' (text box), 'Contact Type' (dropdown menu with 'Primary' selected), 'Phone' (text box), 'Ext' (text box), 'Fax' (text box), 'E-Mail' (text box), and 'Website' (text box). At the bottom left of the form is a 'Save' button, which is highlighted with a red arrow.

Figure 67: Provider Additional Contacts

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

19.2 Edit Additional Contacts

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

19.2.2 Fill out the information.

19.2.3 Click **Save**.

19.3 Add Emergency Contact

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

19.3.2 Fill out the information.

19.3.3 Click **Save**.

19.4 Add Additional Contact After One Contact has been Added

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

19.4.2 Fill out the information.

19.4.3 Click **Save**.

20. 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](#).
- ESRDs have an additional status of **Denied Certification**.
- A **Provider Subtype** must be selected for the ESRD provider type during the certification process
- The **Emergency/Vacation** radio button is only for the ESRD SPRDF subtype.
- OPO provider types can view the OPO QCOR Public Report. Click the link on the Certification page. See *Figure 68, OPO QCOR Public Report Link*.

Note: The **QCOR** page opens in a separate tab.



Figure 68: OPO QCOR Public Report Link

20.1 Click **Certification** on the **Provider Basic Information** page. See *Figure 69, Provider Federal Certification Details*. The **Certification** window opens with details on the certification and the certification history.

The screenshot displays the 'Certification' page for a provider. The left sidebar contains navigation links such as 'Provider Details', 'Basic Information', and 'Certification'. The main content area is titled 'Certification' and includes an 'Edit' button in the top right corner. Below this, the 'Federal Certification' section is highlighted with a red box and contains the following details:

Provider Subtype	Independent Renal Dialysis Facility
Federal Certification Status	Certified
CCN	682663
Certification Date	09/03/2025 ⓘ
Original Participation Date	09/03/2025
Title	Medicare - 18
NPI	No information
Next Survey Due Date	No information

Below the Federal Certification section is the 'Certificate of Need' section, which states: 'Certificates of Need can be uploaded in [Provider Attachments](#). There are no certificates of need for this provider.'

The 'Certification History' section is also highlighted with a red box and contains the following table:

Provider Subtype	Certification Status	Certification Title	CCN	Certification Date	Expiration Date	Original Participation Date	Termination Date	Withdrawal Type
Independent Renal Dialysis Facility	Certified	Medicare - 18	682663	09/03/2025 ⓘ	No information	09/03/2025	No information	No information

Figure 69: Provider Federal Certification Details

20.2 Click **Edit** to make any updates. The **Certification** page opens with current certification and certification history details.

20.3 Update information as needed.

Notes:

- Once assigned, the CCN cannot be changed.
- Only ESRD provider types show the **Certificate of Need**.

20.4 Click **Save**. The **Certification** page updates with the edited information.

21. Licensure

21.1 Click **Licensure** on the **Provider Basic Information** page. See *Figure 70, Provider Federal Certification Details*. The **Licensure** window opens.

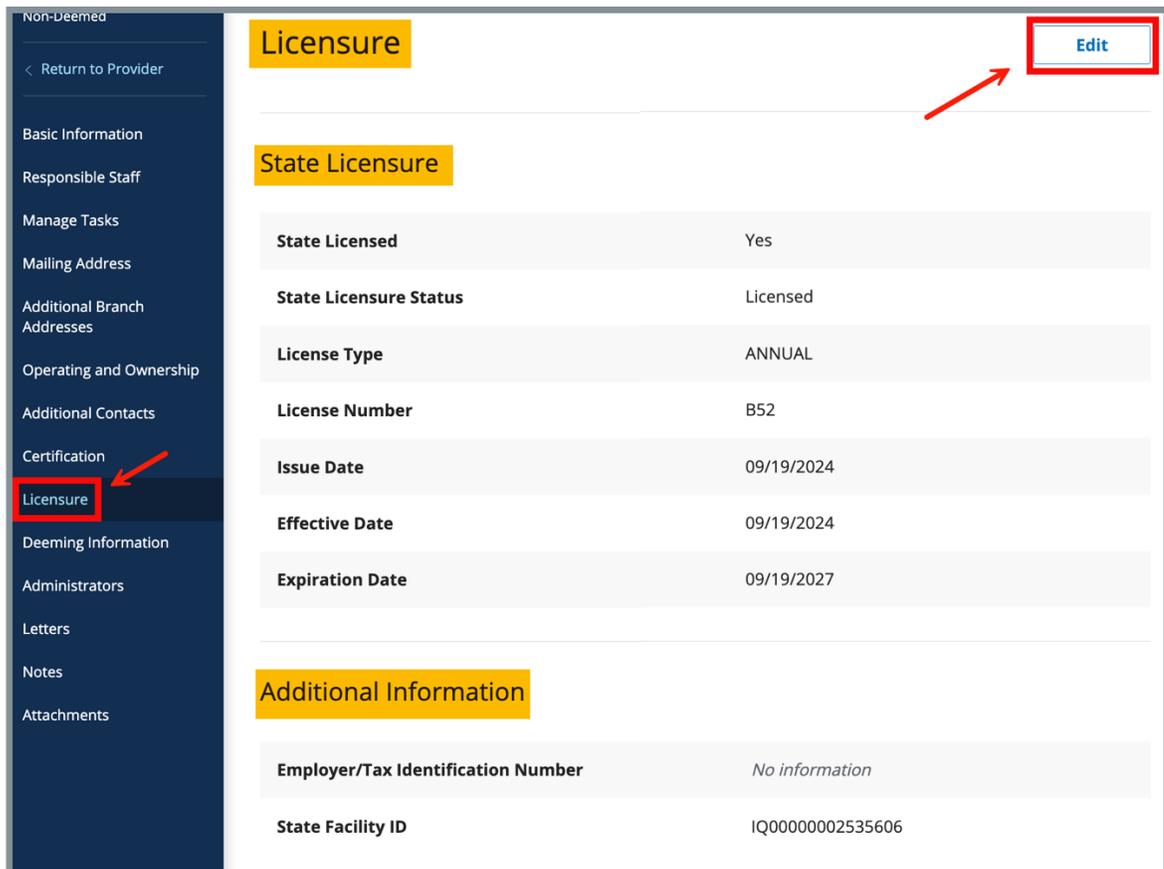


Figure 70: Provider Federal Certification Details

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

21.3 **Update** information as needed.

Notes:

- Once assigned, the CCN cannot be changed.
- Certain licensure information may not be available for all provider types.

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

22. 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.

22.1 View Deeming Information

Click **Deeming Information** on the **Provider Basic Information** page. See *Figure 71, 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.

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 71: Deeming Information Details

22.2 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 72, 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 72: State Survey Jurisdiction Details

22.3 Add Accrediting Organization

22.3.1 Click **Add Accrediting Organization** on the [Deeming Information](#) page. The **Add Accrediting Organization** window opens. See *Figure 73, Add Accrediting Organization*.

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

Accrediting Organization *
The Joint Commission (TJC) ▼

AO Facility ID
[Text Input Field]

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 73: Add Accrediting Organization

22.3.2 Fill out the applicable information.

22.3.3 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.

23. Performance

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

23.1 Click **Performance** on the **Provider Basic Information** page. See *Figure 74, Performance*. The **Performance** window opens.

The screenshot shows the 'Performance' form for Marlon Manor Nursing Home Inc. The form is titled 'Performance' and is located within the 'Marlon Manor Nursing Home Inc' provider profile. The form includes the following fields:

- Program Selection ***: A dropdown menu with 'Select one' selected.
- Date Selected for Program ***: A date input field with the format MM/DD/YYYY.
- Program Status**: A dropdown menu with 'Select one' selected.
- Survey Cycle ***: A dropdown menu with 'Select one' selected.
- Survey Due Date ***: A date input field with the format MM/DD/YYYY.
- Status Changed Date ***: A date input field with the format MM/DD/YYYY.
- Notes**: A text editor with a toolbar containing Bold (B), Italic (i), Underline (U), and list icons. A link for 'Text Editor Keyboard Shortcuts' is also present.

A 'Save' button is located at the bottom of the form. Red arrows in the image point to the 'Performance' menu item in the sidebar and the 'Save' button.

Figure 74: Performance

23.2 Fill out the information.

23.3 Click **Save**. The **Performance** page updates with Performance and Special Focus details. The page can be viewed and edited. See *Figure 75, 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 75: 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.

24. Administrators

24.1 Click **Administrators** on the **Provider Basic Information** page. See *Figure 76, Add Administrator*. The **Add Administrator** window opens.

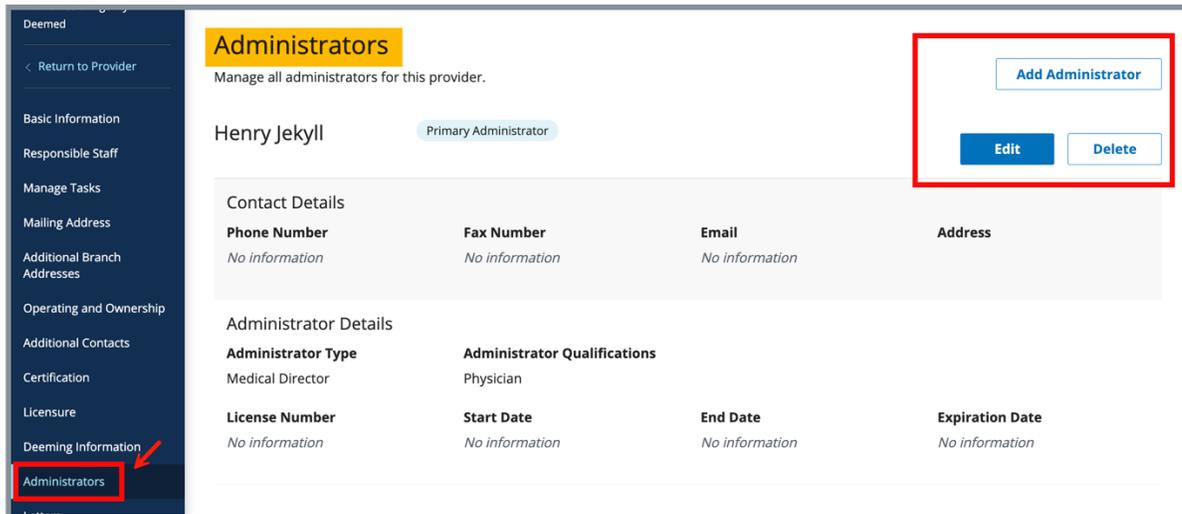


Figure 76: Add Administrator

24.2 Fill out the information.

Notes:

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

24.3 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.

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

25. Bed Summaries

Purpose: To manage bed summaries for the provider.

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

25.1 Click **Bed Summaries** on the **Provider Basic Information** page. See *Figure 77, Add Bed Summary*. The **Bed Summaries** window opens.

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

The screenshot shows the 'Add Bed Summary' form. On the left is a dark blue sidebar with a list of menu items: 'Return to Provider', 'Basic Information', 'Responsible Staff', 'Manage Tasks', 'Buildings/Wings', 'Mailing Address', 'Operating and Ownership', 'Additional Contacts', 'Certification', 'Licensure', 'Performance', 'Administrators', and 'Bed Summaries'. The 'Bed Summaries' item is highlighted with a red box and a red arrow. The main content area has a yellow header 'Add Bed Summary' and a note: 'All required fields are marked with an asterisk (*)'. The form fields are: 'Effective Date *' (with a date input field and 'MM/DD/YYYY' label), 'Medicare' (input field), 'Medicare/Medicaid' (input field), 'Medicaid' (input field), 'ICF/IID' (input field), and 'Licensed Only' (input field). Below these are 'Total Facility Beds' (with a help icon and value '0') and 'Total Certified Beds' (with a help icon and value '0'). At the bottom is a grey 'Save' button with a red arrow pointing to it.

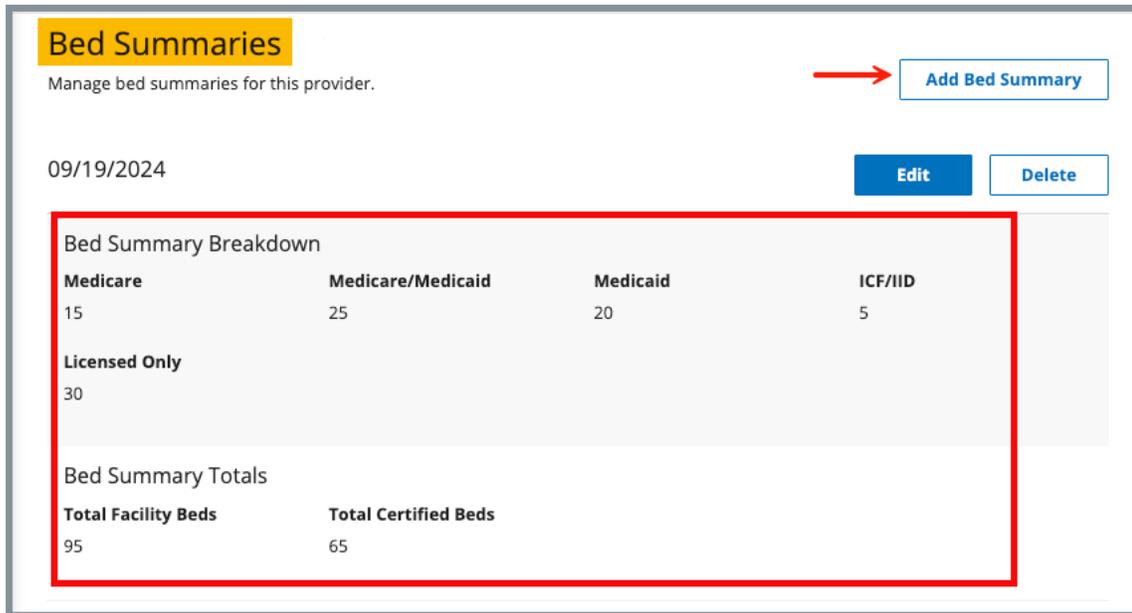
Figure 77: Add Bed Summary

25.2 Fill out the information.

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

25.3 Click **Save**. The **Bed Summaries** page updates. The page can be viewed and edited. See *Figure 78, 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 78: Bed Summaries

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

26. Letters, Notes, Attachments

Note: **Letters, Notes, and Attachments** information can be found in the S&C User Manual: **Letters, Notes, and Attachments** on [QTSO](#).

27. Waivers

Purpose: To manage waivers for the provider.

Note: **Waivers** is enabled for the ESRD provider type only. This waiver is a provider-level waiver. Citation tag-level waivers can be found in the [Manage a Survey User Manual](#) under **Plan of Correction**.

27.1 Click **Waivers** on the **Provider Basic Information** page. See *Figure 79, Waivers*. The **Waivers** window opens.

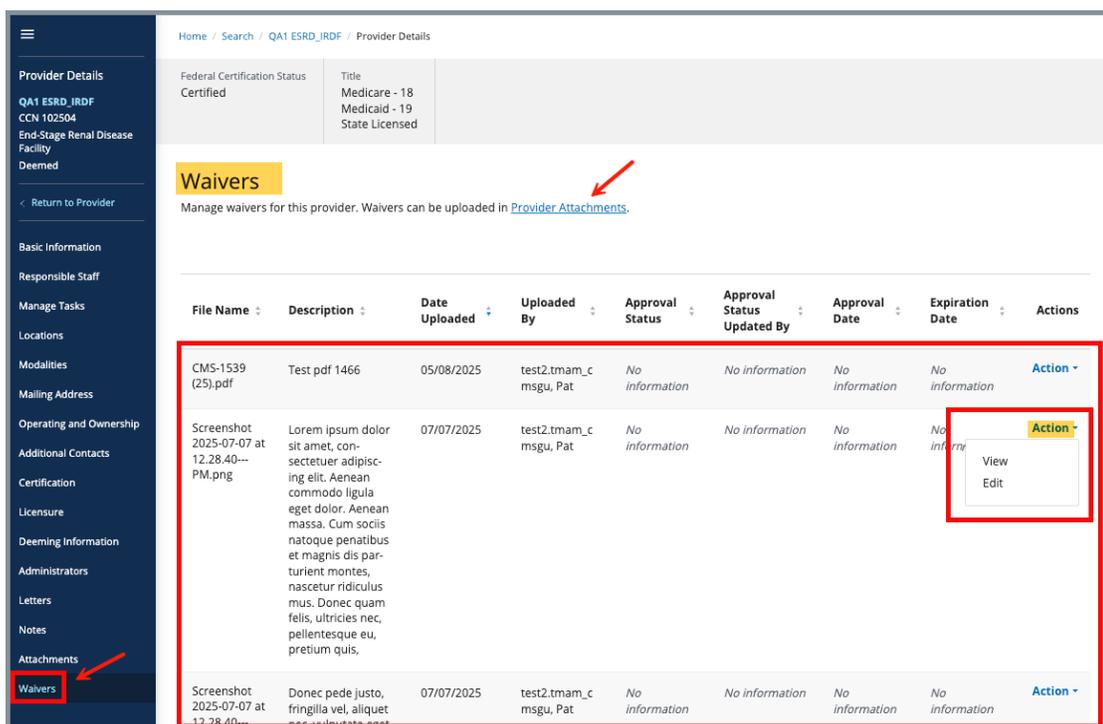


Figure 79: Waivers

27.2 Select **View** under **Action** to view the waiver.

Note: Only a CMSGU can edit the waiver.

27.3 Select **Edit** under **Action** to edit the waiver.

Note: The waiver status defaults to **Pending Approval**.

27.4 Select **Approved** or **Rejected** to approve or reject the waiver.

27.5 Add approval date and approval expiration date, if waiver is approved.

27.6 Click **Save**.

28. Terminate a Provider

Purpose: To terminate a provider or to perform a voluntary conversion.

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.
- Voluntary conversions apply only to OPT/SLP conversions to CORF.

28.1 Click **Certification** from the **Provider Basic Information** page. See *Figure 80, Certification Left Menu*. The **Certification** page opens.

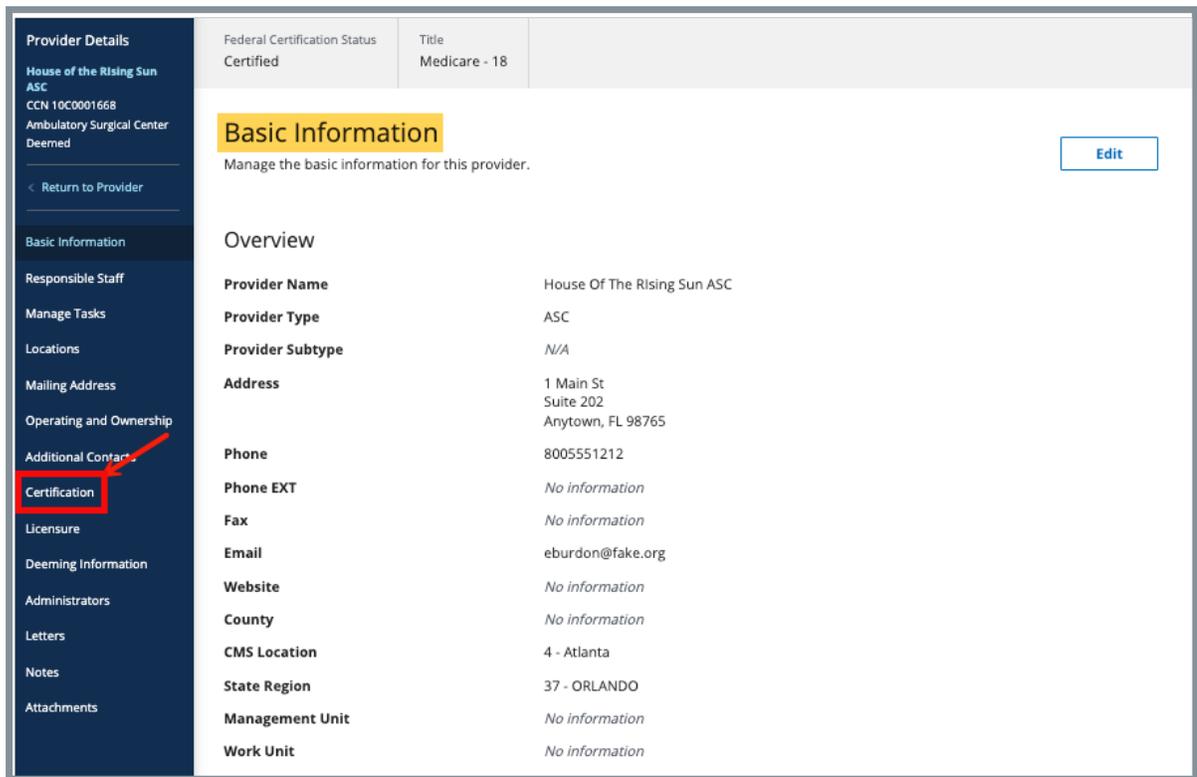


Figure 80: Certification Left Menu

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

28.3 Click **Terminated** under **Federal Certification Status**. See *Figure 81, Federal Certification Voluntary Withdrawal 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
Latest certification survey's exit date: 2023-01-19

Original Participation Date *
03/04/2025
MM/DD/YYYY

Federal Certification Status *

- Not Applicable
- Pending Certification
- Terminated**
- Terminated

Figure 81: Federal Certification Status

28.4 Select the radio button next to the **Withdrawal Type**: [Involuntary Withdrawal](#) or [Voluntary Withdrawal](#).

Involuntary Withdrawal

a. Select the termination date under **Termination Date**. See *Figure 82, Federal Certification Involuntary Withdrawal 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 82: Federal Certification Involuntary Withdrawal Details

- b. Select the reason for termination from the drop-down menu under **Reason**. See *Figure 83, Termination Reason*.

Note: There are three reasons for termination:

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

The screenshot shows a web form titled "Certification" with a sub-section for "Federal Certification". Under "Withdrawal Type", the "Involuntary Withdrawal" radio button is selected. The "Termination Date" field contains "03/04/2025". The "Reason" dropdown menu is open, displaying a list of options: "Select one", "Fail to Meet Health/Safety", "Fail to Meet Agreement", and "Provider Status Change".

Figure 83: Termination Reason

- c. Click **Save**. A pop-up window opens to verify whether the certification should be terminated. See *Figure 84, Termination Pop-Up Window*.

The screenshot shows a modal dialog box with a close button (X) in the top right corner. The text inside asks, "Are you sure you want to terminate this certification?". At the bottom, there are two buttons: a blue "Confirm" button and a "Cancel" button. A red arrow points to the "Confirm" button.

Figure 84: Termination Pop-Up Window

- d. Click **Confirm**.
- e. Verify that **Federal Certification Status** is now **Terminated**. See *Figure 85, Federal Certification Involuntary Withdrawal Status*.

The screenshot displays a user interface for managing provider certification. At the top, a header bar shows 'Federal Certification Status' as 'Terminated' and 'Title' as 'No information'. Below this is a 'Certification' section with an 'Edit' link. A table titled 'Federal Certification' is highlighted with a red box, containing the following data:

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

Below the table is a 'Certification History' section with the message: 'There is no certification history for this provider.'

Figure 85: Federal Certification Involuntary Withdrawal Status

Voluntary Withdrawal

- a. Select the termination date under **Termination Date**. See *Figure 86, Federal Certification Voluntary Withdrawal Details*.

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

Federal Certification

Withdrawal Type *

Involuntary Withdrawal

Voluntary Withdrawal

Termination Date *

MM/DD/YYYY

Reason *

- ✓ Select one
- Merger/Closure
- Dissatisfaction w/ Reimbursement
- Risk of Involuntary Termination
- Other Reason for Withdrawal
- Provider Conversion**

Federal Certification Status *

Not Applicable

Pending Certification

Certified

Terminated

Certification Title

Medicare - 18

Medicaid - 19

NPI

10-digit numerical identifier that identifies an individual provider or a healthcare entity for billing purposes

Figure 86: Federal Certification Voluntary Withdrawal Details

- b. Select **Provider Conversion** from the drop-down menu under **Reason**.
- c. Click **Save**. A pop-up window opens to verify whether the certification should be terminated. See *Figure 87, Termination Pop-Up Window*.

Are you sure you want to terminate this certification?

Figure 87: Termination Pop-Up Window

- d. Click **Confirm**.
- e. Verify that **Federal Certification Status** is now **Terminated**. See *Figure 88, Federal Certification Voluntary Withdrawal Status*.

The screenshot displays a web interface for managing provider certification. At the top, a header bar shows 'Federal Certification Status' as 'Terminated' (highlighted with a red box) and 'Title' as 'Medicare - 18'. Below this is a 'Certification' section with an 'Edit' button. A 'Federal Certification' details table (also highlighted with a red box) lists: Withdrawal Type: Voluntary Withdrawal; Termination Date: 01/22/2026; Reason: Provider Conversion; CCN: 686973; Title: Medicare - 18. Below the details is a 'Certification History' table with the following data:

Certification Status	Certification Title	CCN	Certification Date	Original Participation Date	Termination Date	Withdrawal Type
Terminated	Medicare - 18	686973	01/20/2026	01/20/2026	01/22/2026	Voluntary Withdrawal

Figure 88: Federal Certification Voluntary Withdrawal Status