



## Centers for Medicare & Medicaid Services

# Internet Quality Improvement & Evaluation System (iQIES)

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

**Version 3.0**  
**June 15, 2026**

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# 1. Introduction

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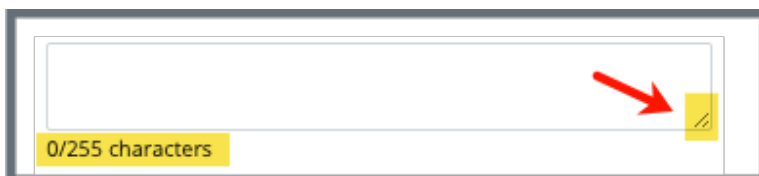
This user manual addresses the processes necessary to perform Survey & Certification (S&C) Provider functions in iQIES.

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

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

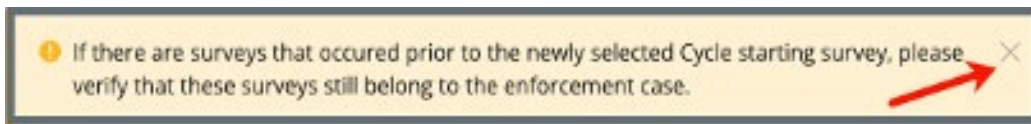
Below is important general information about iQIES.

- 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.

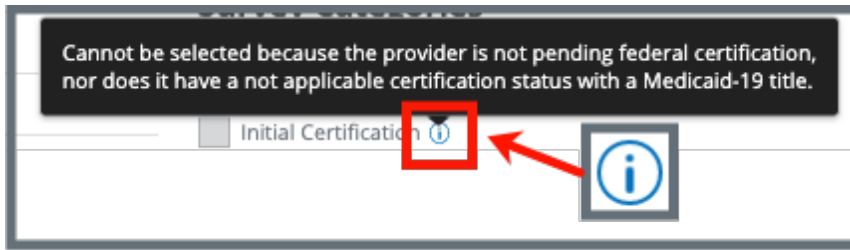


**Figure 2: Notification Banner**

**Table 1: Notification Banner Color Descriptions**

Notification Banner Color	Reason
<b>Green</b>	Action was successful
<b>Blue</b>	Informational only
<b>Yellow</b>	Warning. Review for information.
<b>Red</b>	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](mailto:iQIES@cms.hhs.gov)

**CCSQ Support Central:** Create a new ticket or track an existing ticket:  
[https://cmsqualitysupport.servicenowservices.com/ccsq\\_support\\_central](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.

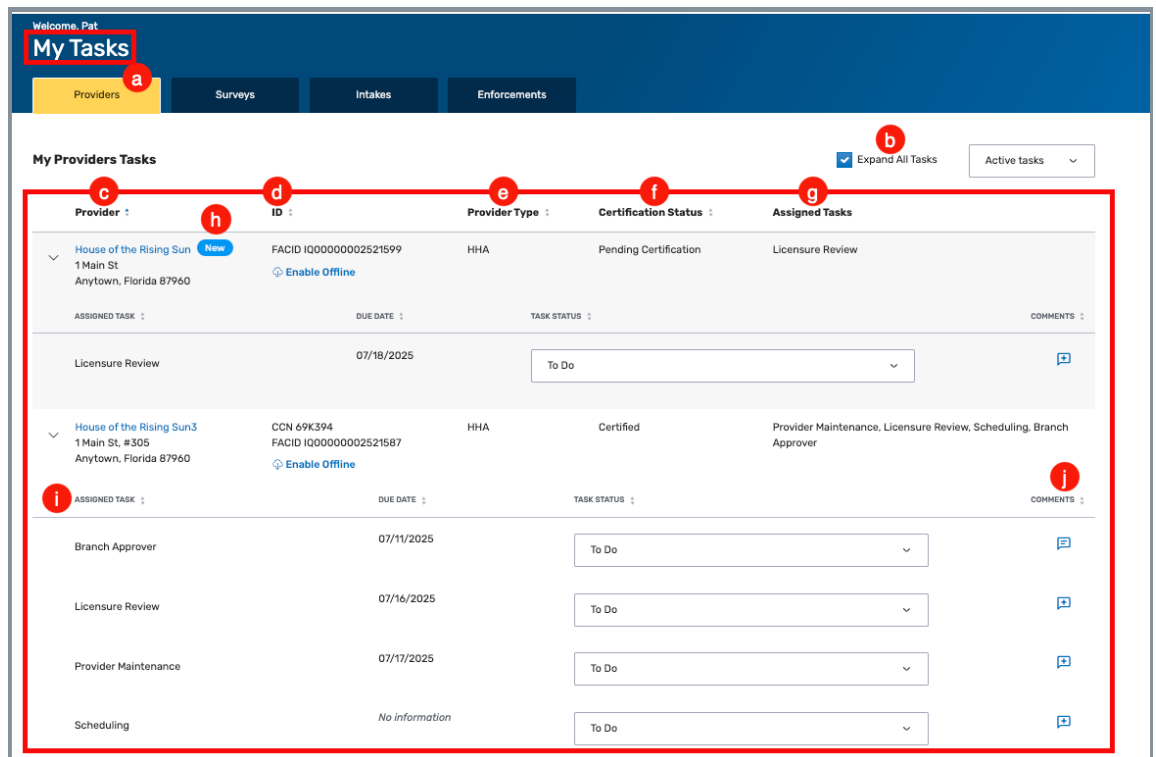
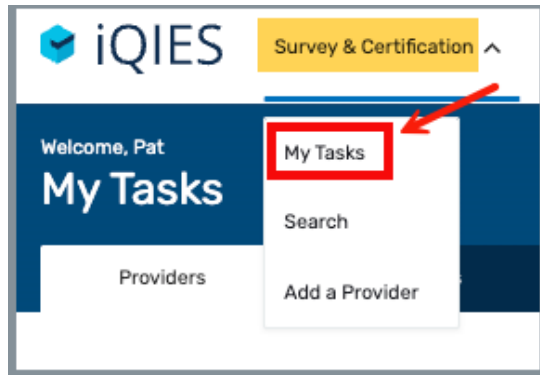


Figure 5: My Tasks Landing Page

**Table 2: My Tasks Landing Page Detailed Callout**

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

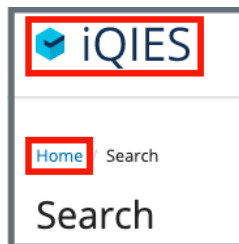
- 1.4.2 Click **My Tasks** under **Survey & Certification** on the top menu to access My Tasks at any time. See *Figure 6, My Tasks Login*. **My Tasks** landing page opens.



*Figure 6: My Tasks Login*

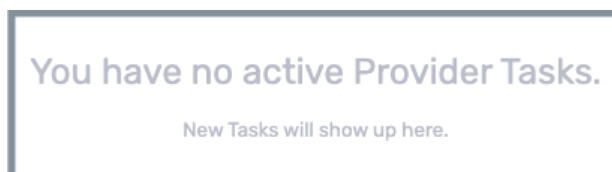
**Notes:**

- 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*.



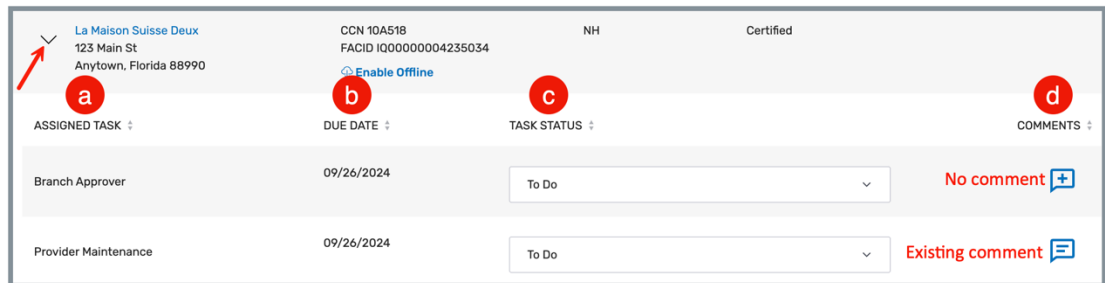
*Figure 7: iQIES Logo*

- 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*.

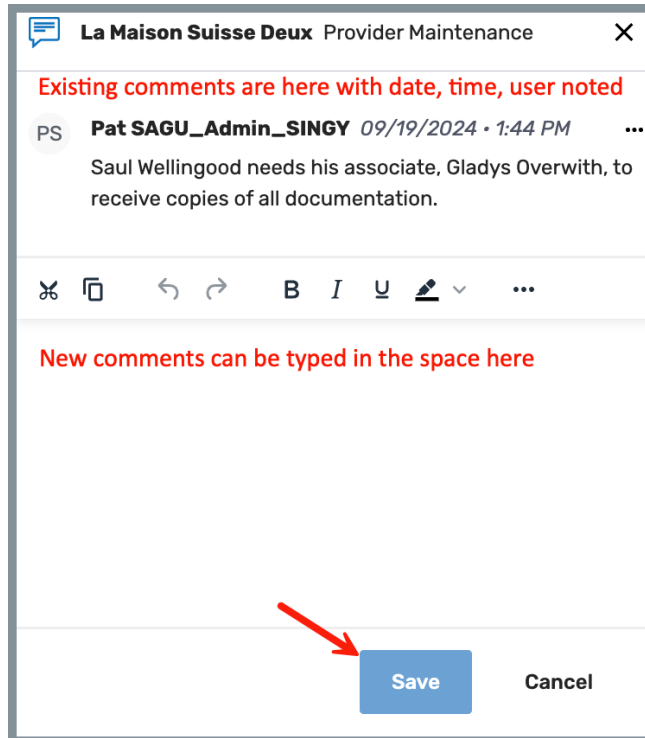


**Figure 9: Task Status Details**

**Table 3: Task Status Details Detailed Callout**

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

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

---

**Important Note:** This manual provides technical instruction on system functionality and does not replace CMS policy. Refer to official CMS guidance for policy requirements.

**Note:** This manual provides technical instruction on system functionality and does not replace CMS policy. Refer to official CMS guidance for policy requirements

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 the following provider types:

**ASC:** Ambulatory Surgical Centers

**CMHC:** Community Mental Health Centers

**CORF:** Comprehensive Outpatient Rehabilitation Facilities

**ESRD:** End Stage Renal Disease Centers

**FQHC:** Federally Qualified Health Centers

**HHA:** Home Health Agencies

**Hospice**

**Hospitals**

**ICF/IID:** Intermediate Care Facilities for Individuals with Intellectual Disabilities

**Nursing Homes**

**OPO:** Organ Procurement Organizations

**OPT/SLP:** Outpatient Physical Therapy/Speech Language Pathology

**PRTF:** Psychiatric Residential Treatment Facility

**PXR:** Portable X-Ray

**RBS:** Risked-Based Surveys

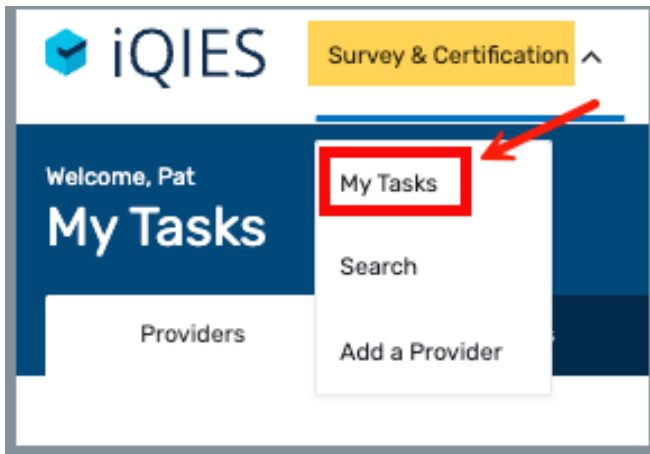
**RHC:** Rural Health Clinic

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

### 3. Search for a Provider

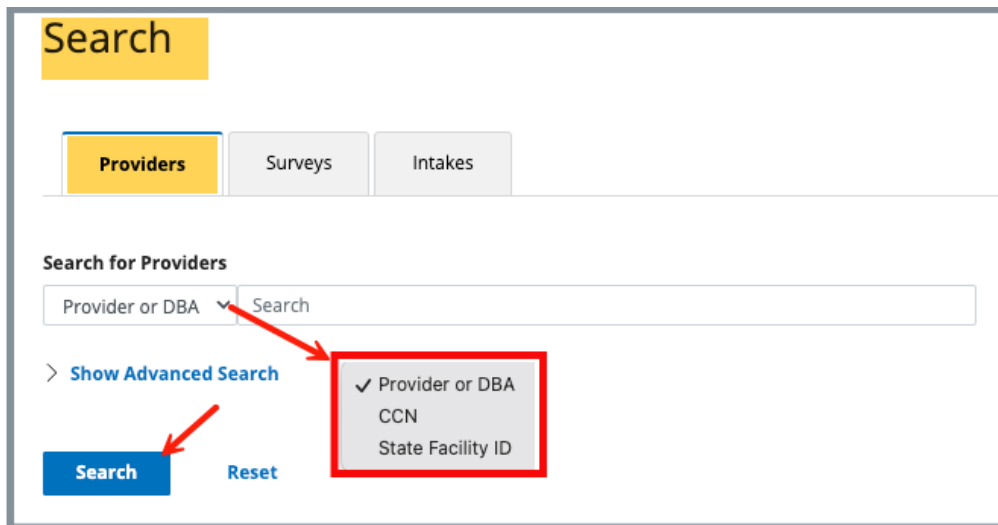
- 3.1 Go to **Survey & Certification** at the top of the iQIES home page. Click the arrow to open the drop-down menu.
- 3.2 Click **Search**. The **Search** screen opens. See *Figure 11, S&C Search*.

**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*



*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: House of the Rising Sun

> Show Advanced Search

Search | Reset

1 - 10 of 44 Providers

Provider	ID	Operating Status	Provider Type	Certification Status	Deemed Status
<a href="#">House of the Rising Sun</a> 1 Main St, Anytown, VA 24501	CCN 49K002 FACID IQ00000002489565	● Open	HHA	Certified Medicaid - 19	Non-Deemed
<a href="#">House of the Rising Sun</a> 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	<a href="#">EDDA1-H1</a>	03/29/2023	01/31/2024	EDDA1	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100%	Form action
CMS-1572	Complete	<a href="#">EDDA1-H1</a>	01/31/2024	01/31/2024	EDDA1	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100%	Form action
CMS-1572	Complete	<a href="#">15A11A-H1</a>	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	<a href="#">View</a>
Complaint 726374	Triage/Prioritization	Immediate Jeopardy	1	08/01/2023	No information	<a href="#">View</a>
Complaint 726352	Triage/Prioritization	Immediate Jeopardy	2	08/01/2023	No information	<a href="#">View</a>

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	<a href="#">1538C1-H1</a> (10/04/2023)	Open - CMP Collection	<a href="#">View</a>
240992-F	Federal	03/17/2022	<a href="#">D4547-H1</a> (01/05/2022)	Open	<a href="#">View</a>

**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:**

- All provider types can be searched by **Provider Subtype**. Select the provider 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](#)

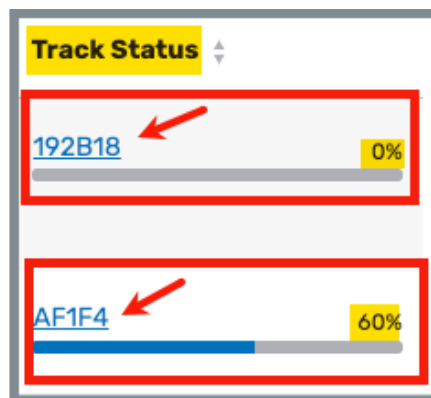
### 4.1 View Certification Progress in Workload Management

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**

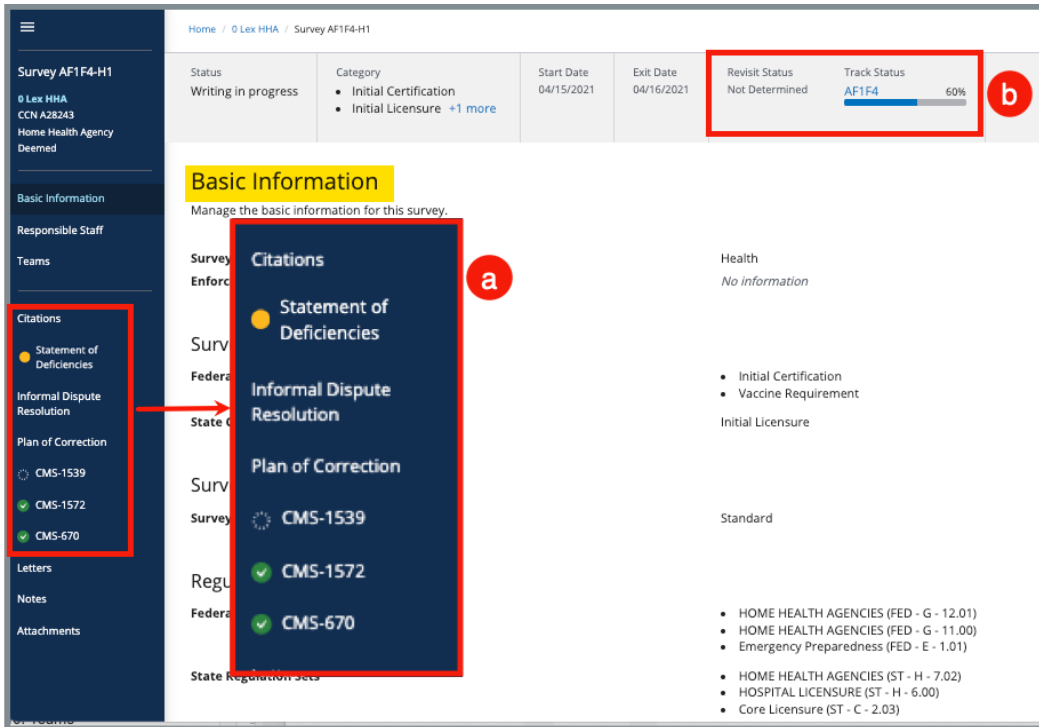
Name	Status	Completed Date
CMS-1539	⦿ Not Started	-
CMS-1572	✔ Complete	11/02/2022

→ 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*.



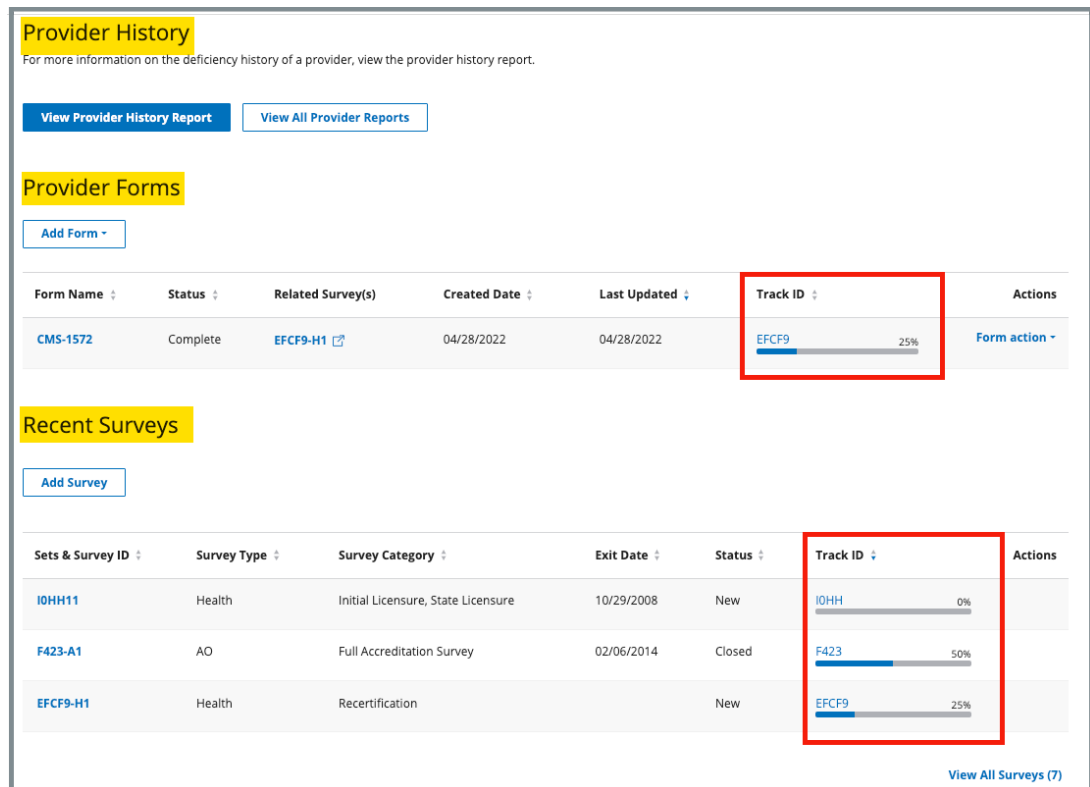
**Figure 18: Survey Basic Information Page Certification Progress**

**Table 4: Survey Basic Information Page Certification Progress Callout Details**

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



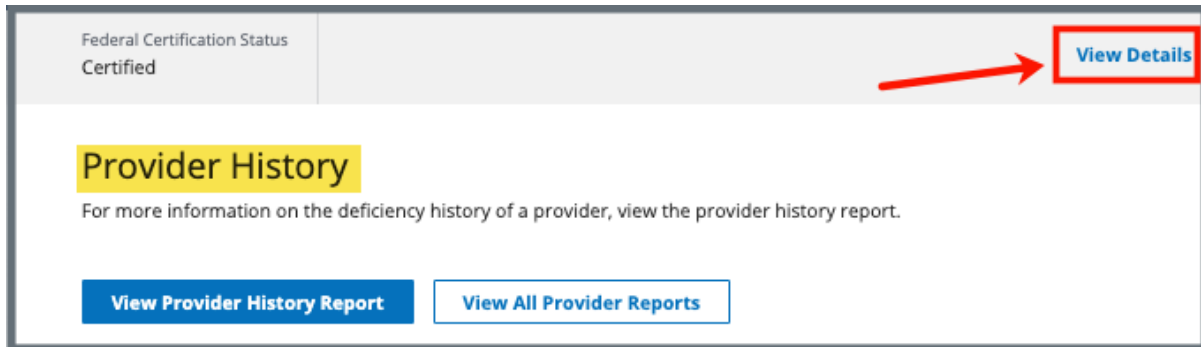
*Figure 19: Provider History Page Certification Progress*

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:

<a href="#"><u>Inpatient Care Provided</u></a>	Hospice Hospital
<a href="#"><u>Inpatient Locations</u></a>	Hospice Hospital
<a href="#"><u>Buildings/Wings</u></a>	ICF/IID Nursing Homes
<a href="#"><u>Locations</u></a>	ASC
<a href="#"><u>Multiple Locations</u></a>	Hospice
<a href="#"><u>Additional Branch Addresses</u></a>	HHA
<a href="#"><u>Extension Locations</u></a>	CORF OPT/SLP
<a href="#"><u>Modalities</u></a>	ESRD
<a href="#"><u>Relationship Manager</u></a>	Hospitals
<a href="#"><u>Accreditation</u></a>	PRTF
<a href="#"><u>Performance</u></a>	Hospice Nursing Homes
<a href="#"><u>Transplant Programs</u></a>	Hospitals/Organ Transplant Programs
<a href="#"><u>Bed Summaries</u></a>	Nursing Homes PRTF
<a href="#"><u>Waivers</u></a>	ESRD

**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.

**Provider Details**  
**Singy Speech Services**  
 CCN 686974  
 Outpatient Physical Therapy / Speech Language Pathology  
 Non-Deemed

< Return to Provider

Basic Information  
 Responsible Staff  
 Manage Tasks  
 Mailing Address  
 Extension Locations  
 Operating and Ownership  
 Additional Contacts  
 Certification  
 Licensure  
 Deeming Information  
 Administrators  
 Letters  
 Notes  
 Attachments

Federal Certification Status	Certified	Title	Medicare - 18
------------------------------	-----------	-------	---------------

### Basic Information

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

#### Overview

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

Figure 21: Provider Basic Information Page

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

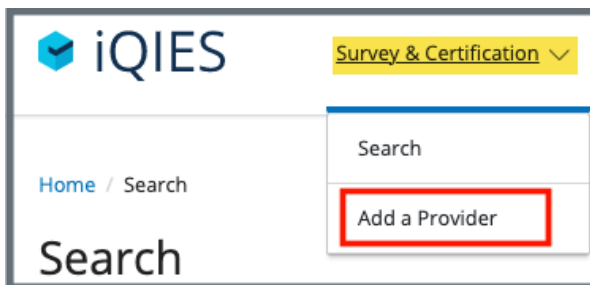
## 6. Add a Provider

---

### 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.

**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

**Primary Practice Location**

**Address 1 \***

**Address 2**

**City \***

**State \***

Select one
▼

**ZIP Code \***

**County**

Select one
▼

**Provider Type \***

Select one
▼

**Provider Subtype**

Select one
▼

### Contact Information

**Phone \***

**Ext**

**Fax**

**E-Mail**

**Website**

### Licensure

**Employer/Tax Identification Number**

Federal tax identification number known as the Employer Identification Number (EIN) used to identify a business entity

**State Facility ID \***

Unique identifier assigned by the state

Add Provider

Cancel

**Figure 23: Add a Provider Basic Information**

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

**Notes:**

- **Add Provider** is disabled until required information is completed.
- An iQIES ID is automatically generated.
- New surveys and intakes can now be added.
- All provider types require a **Provider Subtype**. The **Provider Type** selection determines which additional fields or options are available. Some provider types may only have one choice, but that must be selected. Any nonstandard behavior is noted below.
- **FQHC provider types:** Have an additional field of **Offer Mobile Services**. See *Figure 24, FQHC Provider Type*.

*Figure 24: FQHC Provider Type*

- **Hospitals/Transplants:** The [Transplant Programs](#) selection on the left menu appears when the **Organ Transplant Programs Provider Subtype** is selected. See *Figure 25, Organ Transplant Program Subtype*. Click **Transplant Programs** on the left menu to view certification details and the transplant program summary.

*Figure 25: Organ Transplant Program Subtype*

- **RHC provider types:** Have an additional field of **Offer Mobile Services**. See *Figure 26, FQHC Provider Type*.

The screenshot displays a form for FQHC Provider Type with three main sections highlighted by red boxes:

- Provider Type \***: A dropdown menu with "RHC" selected.
- Provider Subtype \***: A dropdown menu with "Free-Standing" selected. The dropdown list is open, showing "Select one", "Free-Standing", and "Provider-Based".
- Offers Mobile Services \***: A group of radio buttons with three options: "Mobile Unit", "Permanent Unit", and "Permanent Unit with Mobile Services" (which is selected).

*Figure 26: FQHC Provider Type*

## 7. Inpatient Care Provided

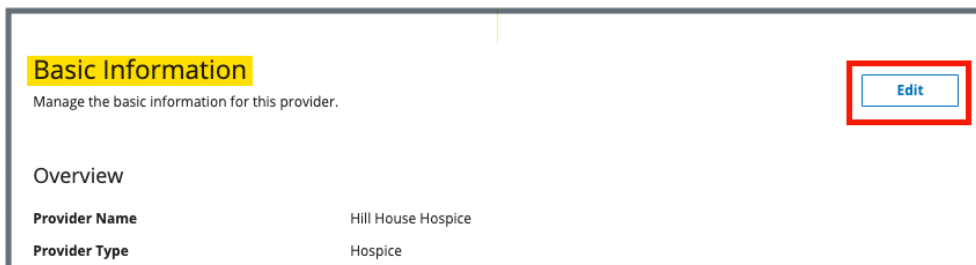
---

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

**Notes:**

- Inpatient Care Provided is enabled for Hospice and Hospital provider types only.
- Examples shown are for Hospice.

**7.1** Click **Edit** on the **Provider Basic Information** page. See *Figure 27, Provider Basic Information Edit Page*. The **Basic Information** edit page opens.



*Figure 27: Provider Basic Information Edit Page*

**7.2** Click the **Yes** or **No** radio button under **Inpatient Care Provided**. See *Figure 28, 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 28: Inpatient Care Provided Radio Buttons*

**7.3 Click Save.**

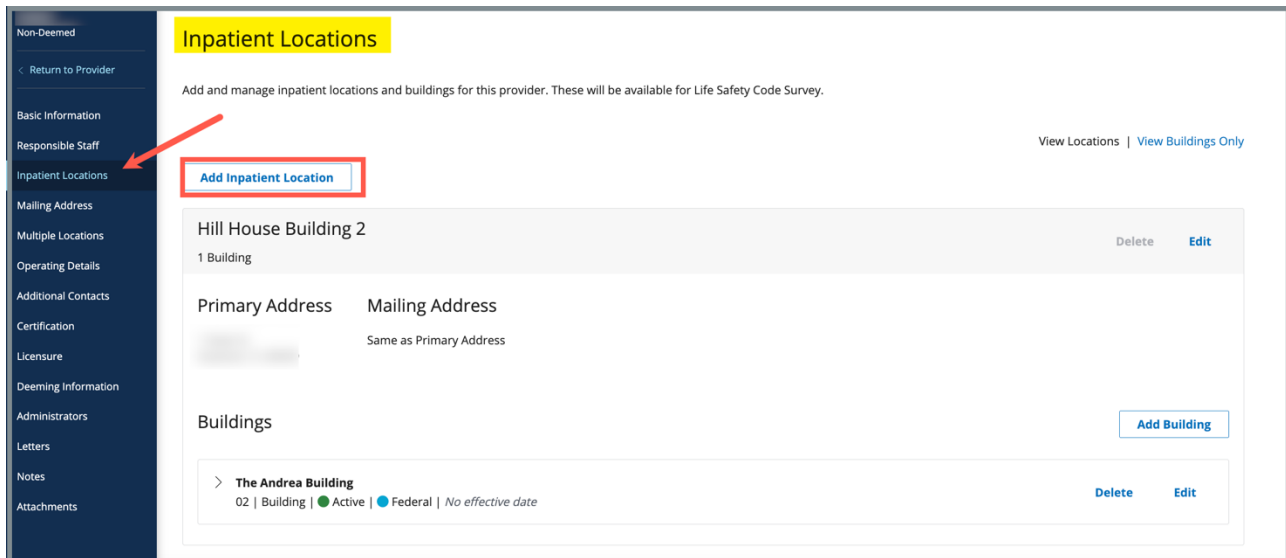
## 8. Inpatient Locations

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

**Notes:**

- Inpatient Locations is enabled for Hospice and Hospital provider types only.
- Not all Hospital subtypes can be enabled for **Inpatient Locations**.
- [Inpatient Care Provided](#) must be answered **Yes** to view **Inpatient Locations**.

**8.1** Click **Inpatient Locations** on the left menu. See *Figure 29, Inpatient Locations*. The **Inpatient Locations** page opens.



*Figure 29: Inpatient Locations*

**8.2** Click **Add Inpatient Location**. The **Inpatient Location** fields open below. See *Figure 30, 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**

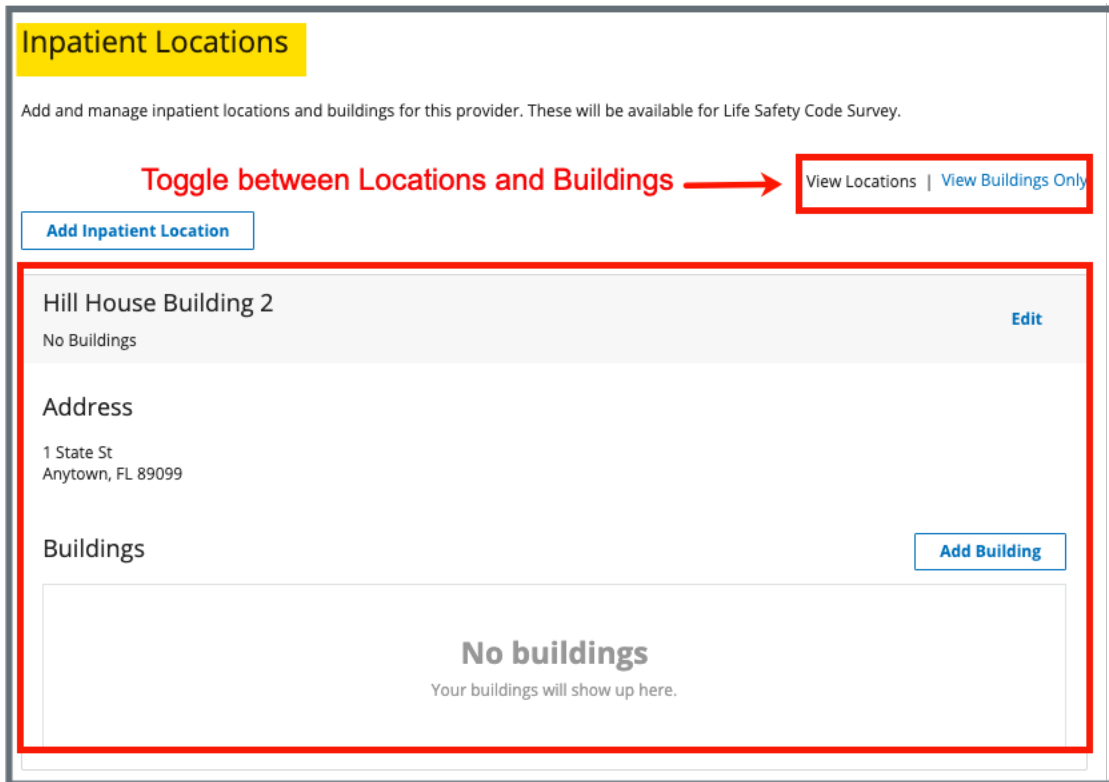
**City \***  **State \***  **ZIP Code \***

**Location Mailing Address**

Location Mailing Address is the same as Primary

**Figure 30: Inpatient Locations Fields**

- 8.3** Fill out the information.
- 8.4** Click **Save**. The **Inpatient Locations** page populates with the new location. See *Figure 31, Inpatient Locations Information*.



*Figure 31: 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 32, 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 \***  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**

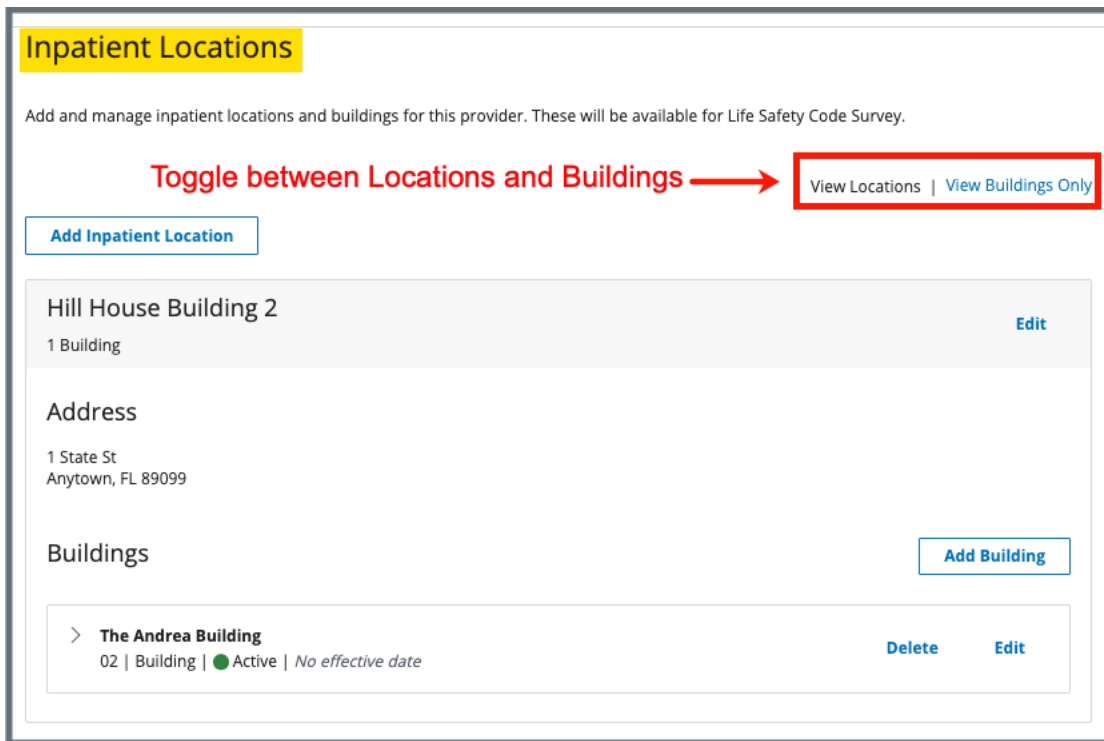
**Hazmat Area Separate**  **FSES Date**   
MM/DD/YYYY

**Sprinkler Status**  **Sprinkler Required**

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

Figure 32: Inpatient Locations Building

**8.6** Click **Save**. The **Inpatient Locations** page populates with the new building information. See *Figure 33, Inpatient Locations Buildings Information*.



**Figure 33: 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 34, Provider Responsible Staff*.

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

**Figure 34: 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**.

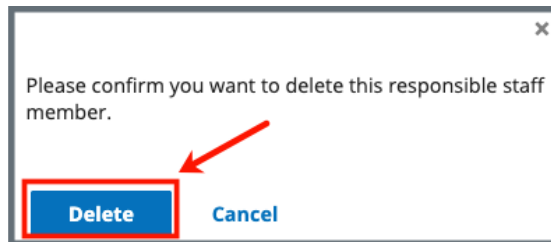
9.1.8 Verify the staff member appears in the list below **Responsible Staff**.

**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 35, Delete a Responsible Staff*.



*Figure 35: 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 36, Manage Tasks* and *Table 5, Manage Tasks Detailed Callout*.

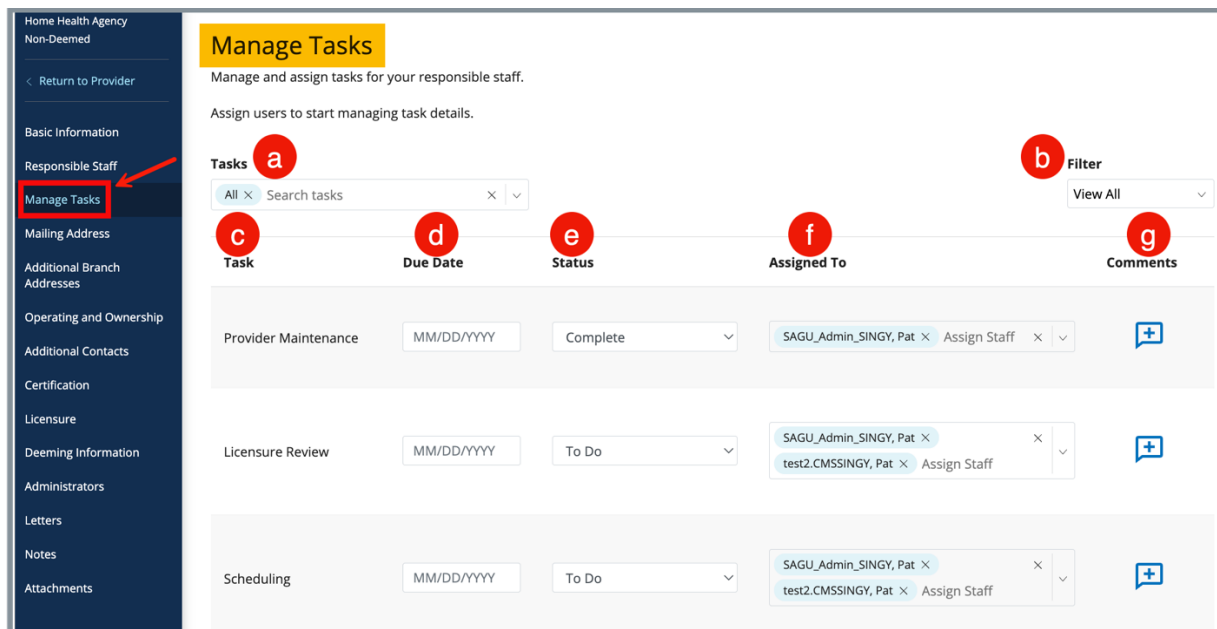


Figure 36: Manage Tasks

Table 5: Manage Tasks Detailed Callout

No.	Description
a	Select individual tasks from the drop-down menu under <b>Tasks</b> to assign to the <b>Responsible Staff</b> or select <b>All</b>
b	Select <b>View All</b> , <b>Assigned</b> , or <b>Unassigned</b> from the drop-down menu. <b>View All</b> is the default.
c	Each task that is selected shows under <b>Task</b>
d	The <b>Due Date</b> of the task
e	The <b>Status</b> of the task.
f	The Responsible Staff assigned to the task. More than one Responsible Staff can be assigned the task.
g	Click the <b>+</b> icon to add a comment.

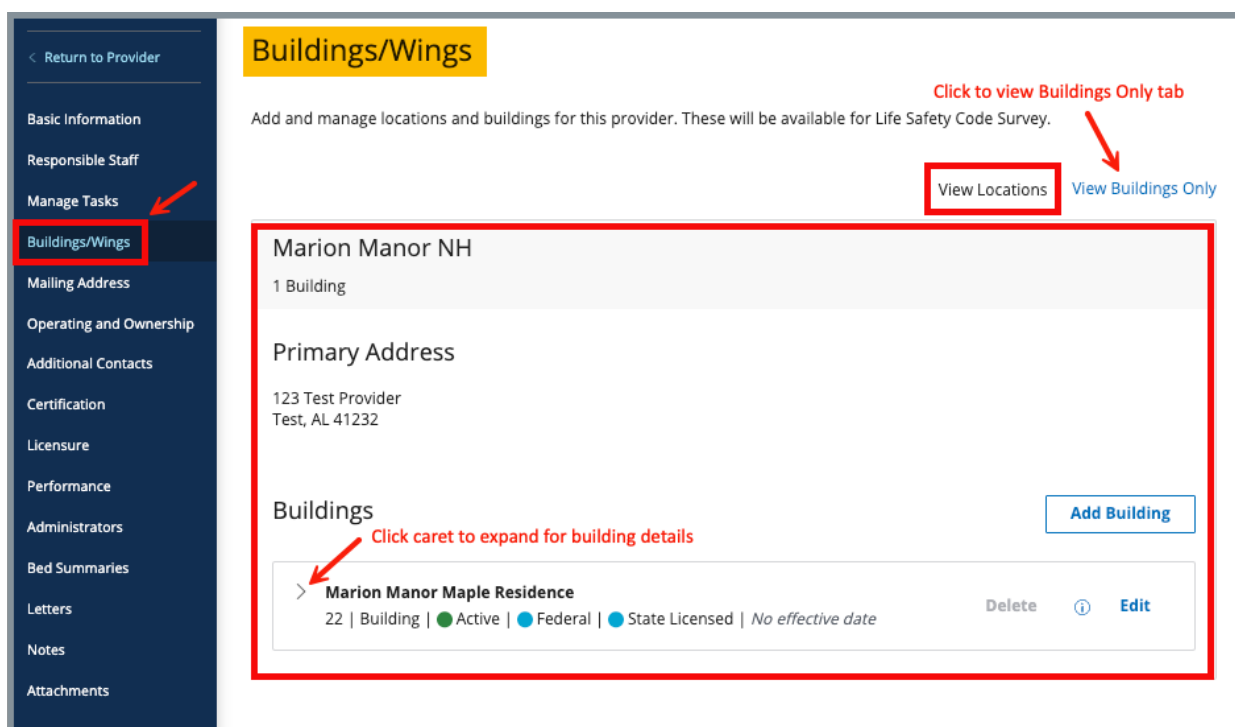
# 11. Buildings/Wings

**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 37, Buildings/Wings*. The **Buildings/Wings** page opens.



*Figure 37: 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 38, 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 38: 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 39, Add New Building*.

The screenshot shows a web form titled "Buildings" with a yellow header and a "Buildings" tab. A red box highlights the main form area. At the top right, there is an "Add Building" button. Below the header, a note states: "All required fields are marked with an asterisk. (\*)".

The form contains the following fields:

- 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" selected.
- 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" selected.
- Construction Date**: A date input field with format "MM/DD/YYYY".
- Federal LSC Form Indicator \***: A dropdown menu with "Select one" selected.
- Regulation Set**: A greyed-out text input field.
- State LSC Form Indicator \***: A dropdown menu with "Select one" selected.
- Regulation Set**: A greyed-out text input field.
- Hazmat Area Separate**: A dropdown menu with "Select one" selected.
- FSSES Date**: A date input field with format "MM/DD/YYYY".
- Sprinkler Status**: A dropdown menu with "Select one" selected.
- Sprinkler Required**: A dropdown menu with "Select one" selected.
- Building Location Detail**: A large text input field with a note: "Additional details such as landmarks, directions, etc." and 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.

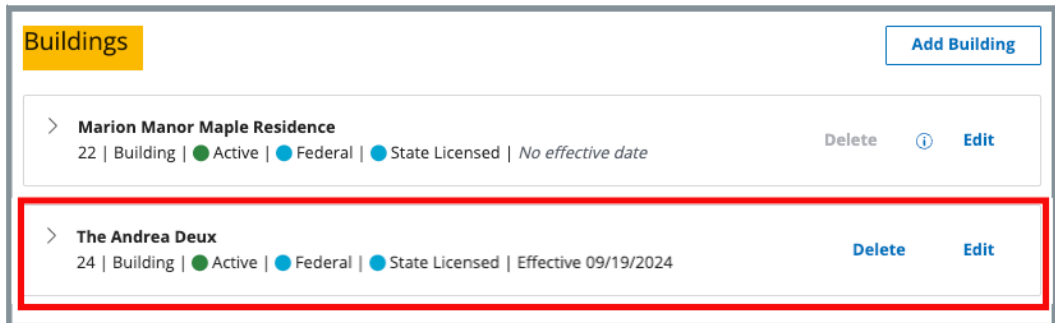
**Figure 39: Add New Building**

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 40, New Building Information*.



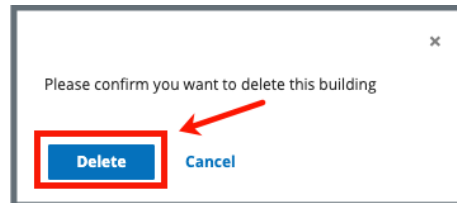
*Figure 40: New Buildings Information*

**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 41, Delete Building Pop-up Window*.



*Figure 41: Delete Building Pop-up Window*

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

## 11.4 Edit a Building

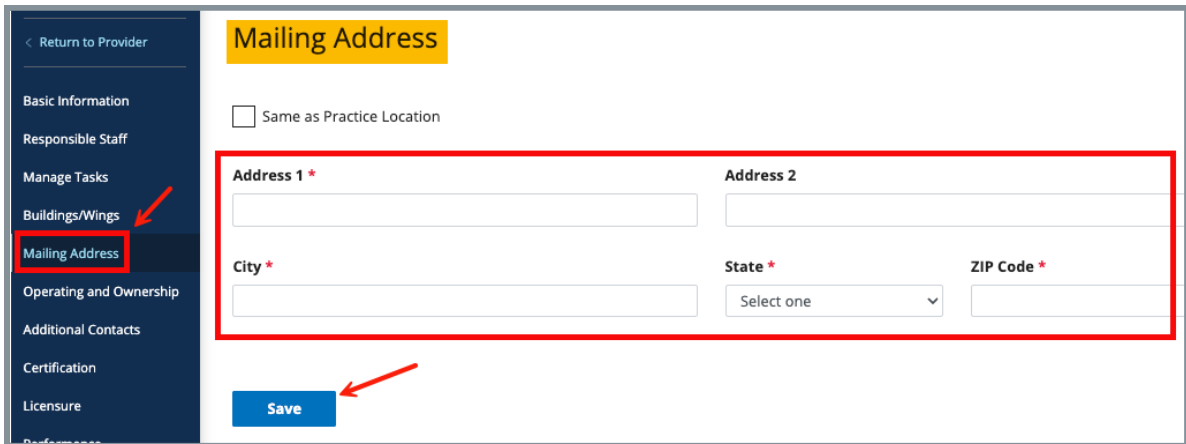
11.4.1 Click **Edit** next to the building that needs to be edited. The current building information populates below **Buildings** and can be edited.

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 42, 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 list of menu items: '< 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 labeled 'Same as Practice Location'. Below this is a red-bordered box containing the form fields: 'Address 1 \*' and 'Address 2' (text input fields), 'City \*' (text input field), 'State \*' (dropdown menu with 'Select one' and a downward arrow), and 'ZIP Code \*' (text input field). A blue 'Save' button is located at the bottom left of the form area, with a red arrow pointing to it.

*Figure 42: Provider Mailing Address*

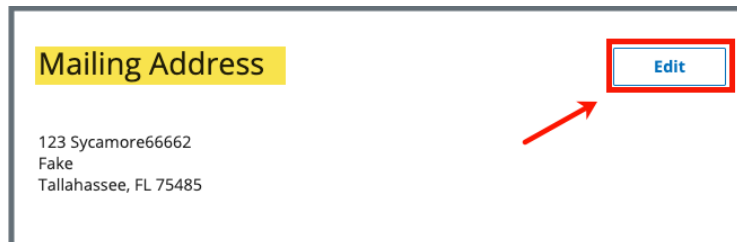
12.1.2 Fill out the information.

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 43, Edit Mailing Address*.



*Figure 43: Edit Mailing Address*

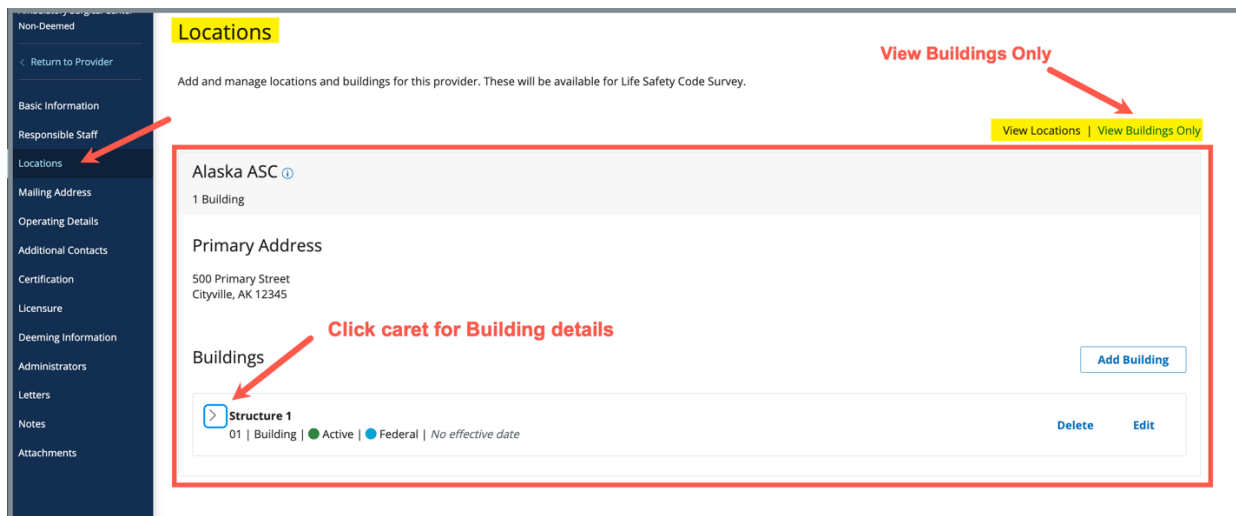
12.2.3 Fill out the information.

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 44, Locations*. The **Locations** window opens.



*Figure 44: 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 45, New Building*.

The screenshot shows the 'New Building' form with the following fields and sections:

- Parent Location:** A dropdown menu showing 'Andrea's All-Inclusive ASC'.
- Building Name \*:** A text input field with a 500-character limit.
- Building Licensure:** A checkbox labeled 'State Licensed Only'.
- Building ID \*:** A text input field with a 2-character limit.
- Type \*:** A dropdown menu with 'Select one'.
- Number of Stories:** A text input field.
- Plan Approval Date:** A date input field (MM/DD/YYYY).
- Effective Date:** A date input field (MM/DD/YYYY).
- Closed Date:** A date input field (MM/DD/YYYY).
- Construction Type:** A dropdown menu with 'Select one'.
- Construction Date:** A date input field (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 (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 and directions.

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

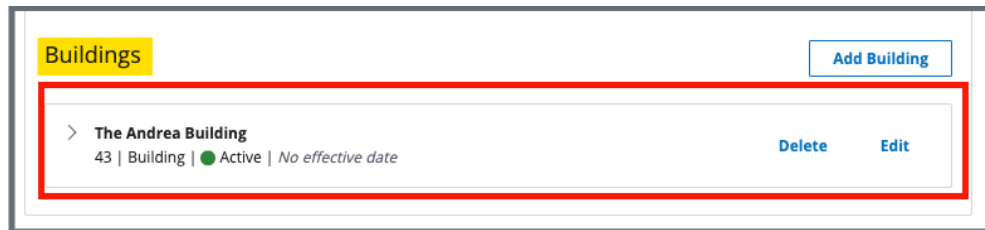
*Figure 45: New Building*

### 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 46, New Building Information*.



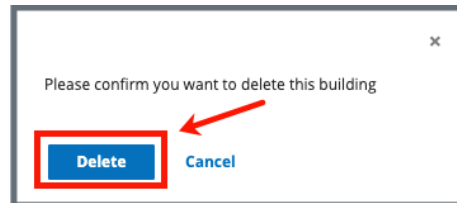
*Figure 46: New Buildings Information*

**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 47, Delete Building Pop-up Window*.



*Figure 47: 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 48, Multiple Locations*. The **Locations** window opens.

The screenshot shows the 'Multiple Locations' form interface. On the left is a dark blue sidebar with a menu. The 'Multiple Locations' item is highlighted, and a red arrow points to it. The main content area has a white background with a yellow header 'Multiple Locations' and a note: 'All required fields are marked with an asterisk (\*)'. The form fields are:
 

- Location Name \***: A text input field.
- Status**: A dropdown menu with 'Open' selected.
- Open Date**: A date input field with the format 'MM/DD/YYYY'.
- Address**: Two text input fields, **Address 1 \*** and **Address 2**.
- City \***: A text input field.
- State \***: A dropdown menu with 'Select one' selected.
- ZIP Code \***: A text input field.
- County**: A text input field.

 A 'Save' button is located at the bottom left of the form area.

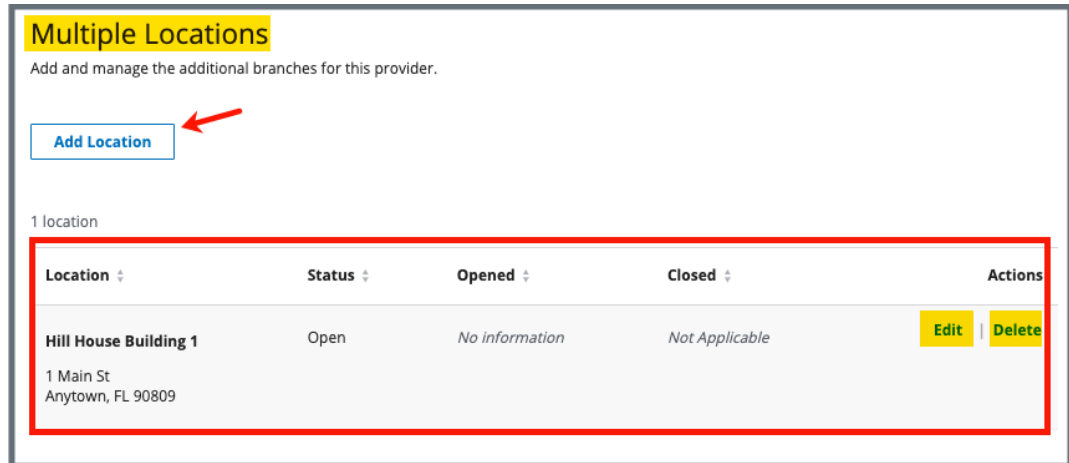
*Figure 48: Multiple Locations*

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 49, Multiple Locations Information*.



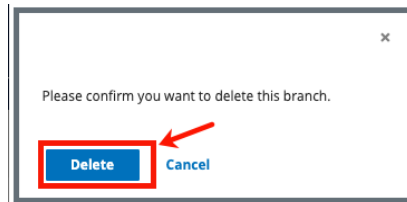
*Figure 49: Multiple Locations Information*

**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 50, Delete Location Pop-up Window*.



*Figure 50: 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 51, Edit Multiple Locations*.

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

**Location Name \***

**Status \*** **Open Date**  
 Open   
 Closed MM/DD/YYYY

**Address**  
**Address 1 \***  **Address 2**

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

**County**

*Figure 51: 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 CORF, HHA, and OPT/SLP provider types only.

**Notes:**

- Providers must be certified to add an additional branch.
- New branches are assigned Branch CCNs when the record is saved.

**15.1** Click **Additional Branch Addresses** on the **Provider Basic Information** page. See *Figure 52, 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 52: 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 53, 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 is titled 'Add Extension Location' and includes a note: 'All required fields are marked with an asterisk (\*)'. The form fields are:
 

- Extension Location Name \***: Text input field containing 'Singy Motion Commotion PT'.
- Medicare Extension Location ID**: Text input field with a note: 'Automatically generated upon save if the provider is certified'.
- Extension Location Status**: Radio button for 'Open'.
- Open Date**: Text input field with a placeholder 'MM/DD/YYYY'.
- Services Provided \***: Section with 'Check all that apply' and three checkboxes: 'Physical Therapy', 'Speech Pathology', and 'Occupational Therapy'.
- Hours of Operation**: Section with 'Check one' and two radio buttons: 'Full-Time' and 'Part-Time'.
- Extension Location Address**: Section with four input fields: 'Address 1 \*', 'Address 2', 'City \*', and 'State \*' (a dropdown menu showing 'Select one'). There is also a 'ZIP Code \*' field and a 'County' field.
- Save**: A button at the bottom of the form, highlighted with a red arrow.

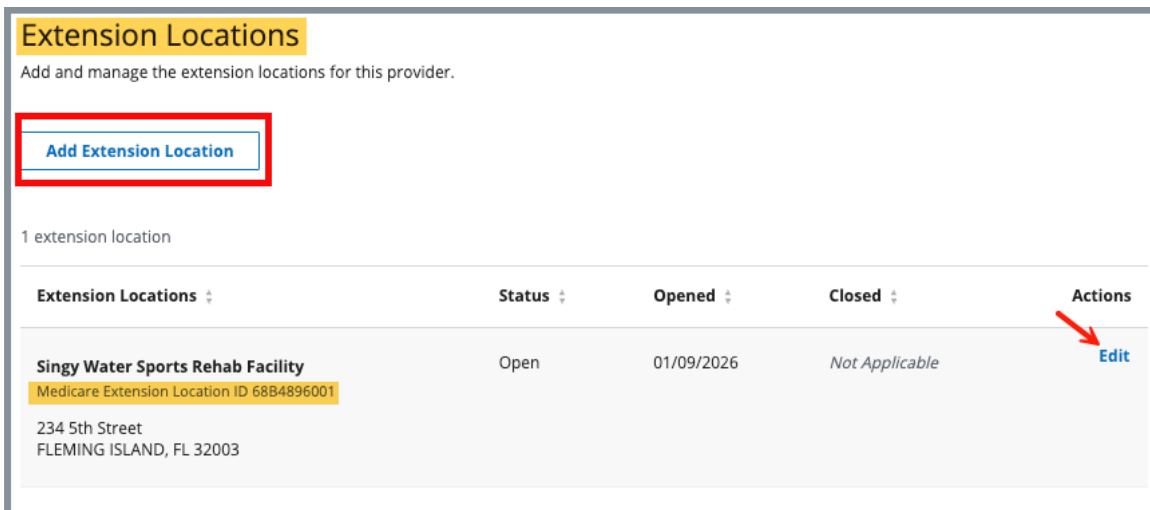
*Figure 53: Extension Locations*

**16.2** Fill out the information.

**16.3** Click **Save**. The **Extension Locations** window opens with details on the location. See *Figure 54, 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.

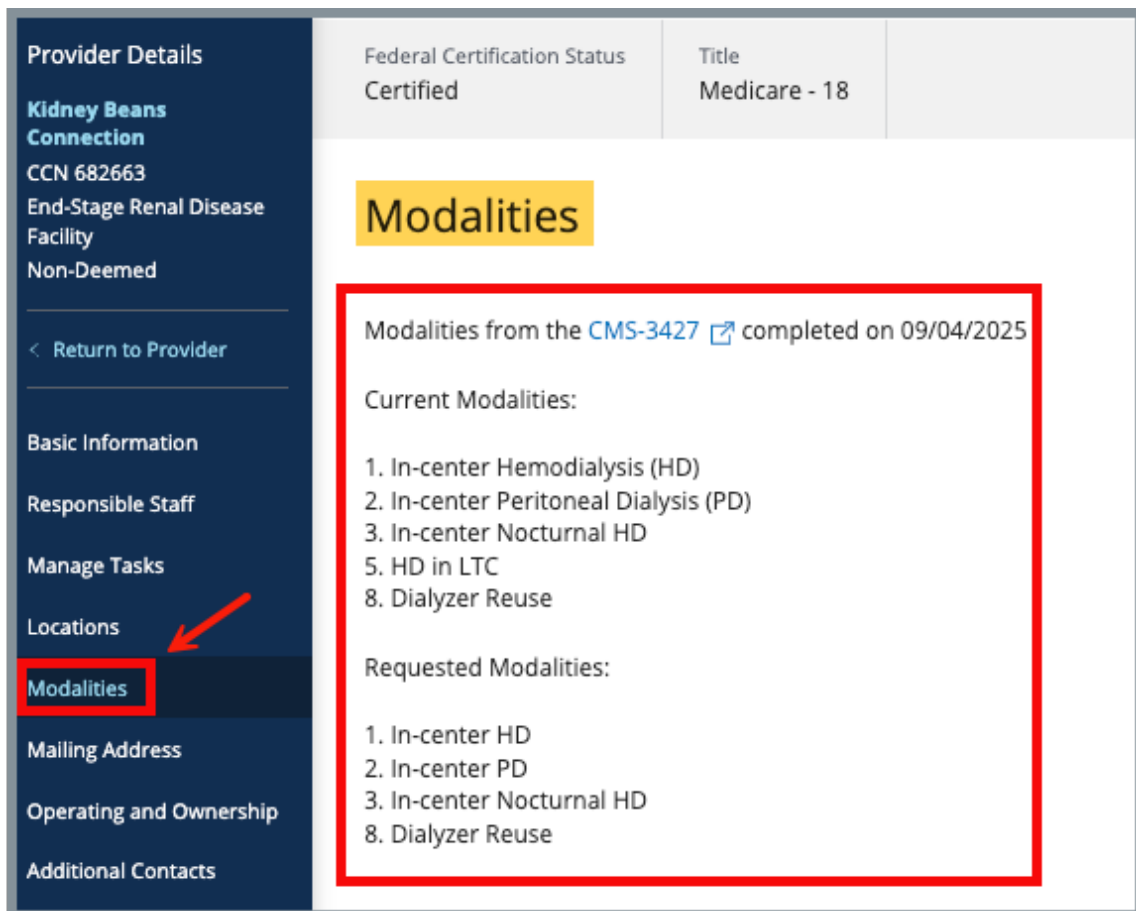


**Figure 54: Extension Location with Locations**

# 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 55, Locations*. The **Modalities** window opens.



*Figure 55: Modalities*

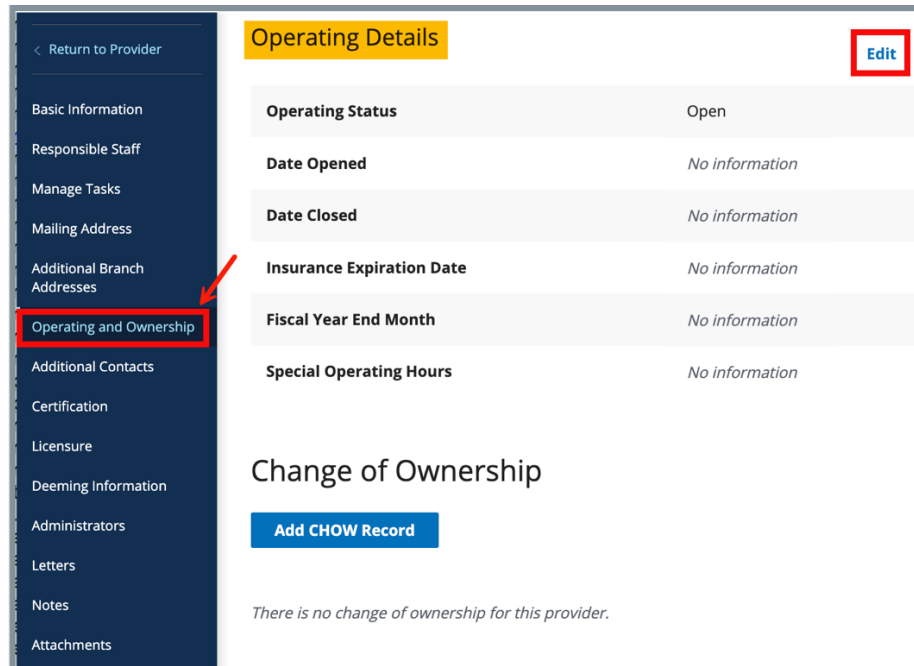
**17.2** Click **CMS-3427** to view the CMS-3427 form. The form opens in a separate tab.

**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 56, 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 56: 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.

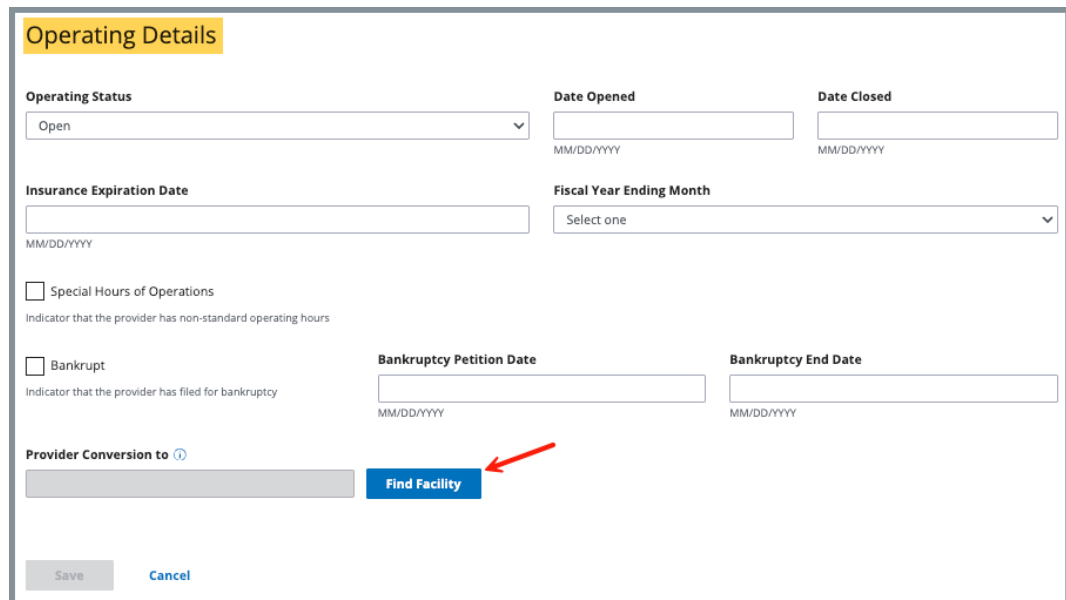
18.1.3 Update information as needed.

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

## 18.2 Provider Conversion: OPT/SLP to CORF

**Note:** The OPT/SLP provider type can convert 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 57, Find CORF Provider for Conversion*. The **Select the CORF Provider for Conversion** pop-up window opens.



The screenshot shows the "Operating Details" form. The form includes several input fields and checkboxes. A red arrow points to the "Find Facility" button, which is highlighted in blue. The "Find Facility" button is located next to a text input field labeled "Provider Conversion to".

**Operating Details**

**Operating Status**  
Open

**Date Opened**  
MM/DD/YYYY

**Date Closed**  
MM/DD/YYYY

**Insurance Expiration Date**  
MM/DD/YYYY

**Fiscal Year Ending Month**  
Select one

Special Hours of Operations  
Indicator that the provider has non-standard operating hours

Bankrupt  
Indicator that the provider has filed for bankruptcy

**Bankruptcy Petition Date**  
MM/DD/YYYY

**Bankruptcy End Date**  
MM/DD/YYYY

**Provider Conversion to** ⓘ

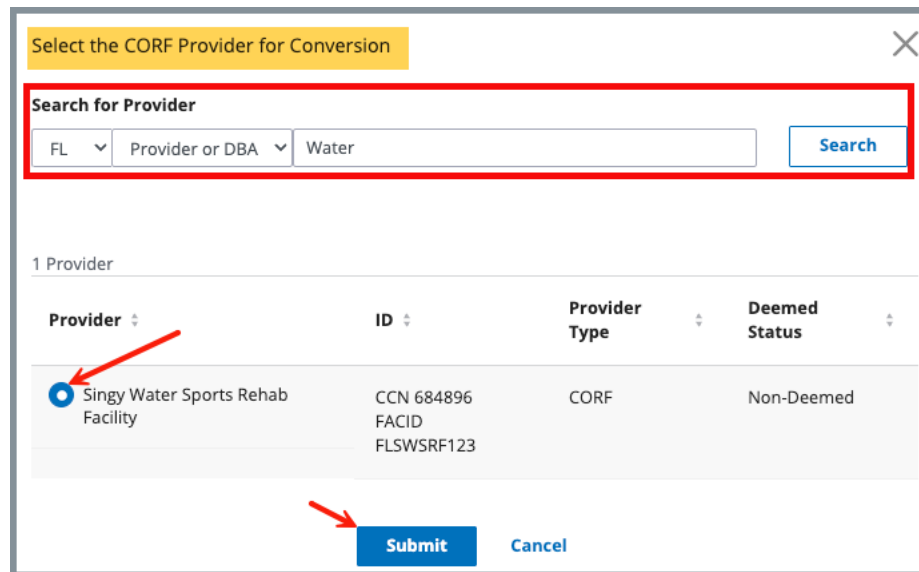
**Find Facility**

**Save** **Cancel**

*Figure 57: 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 provider. See *Figure 58, 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 58: 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 59, Provider Conversion From OPT/SLP Provider* and *Figure 60, Provider Conversion To CORF*.

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

The screenshot shows the 'Provider Details' page for Singy Water Sports Rehab Facility (CCN 684896). The left sidebar lists various sections, with 'Provider Details' highlighted. The main content area shows the following information:

Federal Certification Status	Certified	Title	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	<a href="#">Singy Motion Commotion PT (686973)</a>

Figure 59: Provider Conversion From OPT/SLP

The screenshot shows the 'Provider Details' page for Singy Motion Commotion PT (CCN 686973). The left sidebar lists various sections, with 'Provider Details' highlighted. The main content area shows the following information:

Federal Certification Status	Terminated	Title	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	<a href="#">Singy Water Sports Rehab Facility (684896)</a>

Figure 60: Provider Conversion To CORF

### 18.3 Provider Conversion: FQHC to RHC and RHC to FQHC

**Notes:**

- Both the FQHC and RHC provider types can convert between provider types.
- The examples below show an FQHC provider type conversion to an RHC provider type. RHC can also convert to FQHC.

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

18.3.2 Click **Find Facility**. See *Figure 61, Find RHC Provider for Conversion*. The **Select the RHC Provider for Conversion** pop-up window opens.

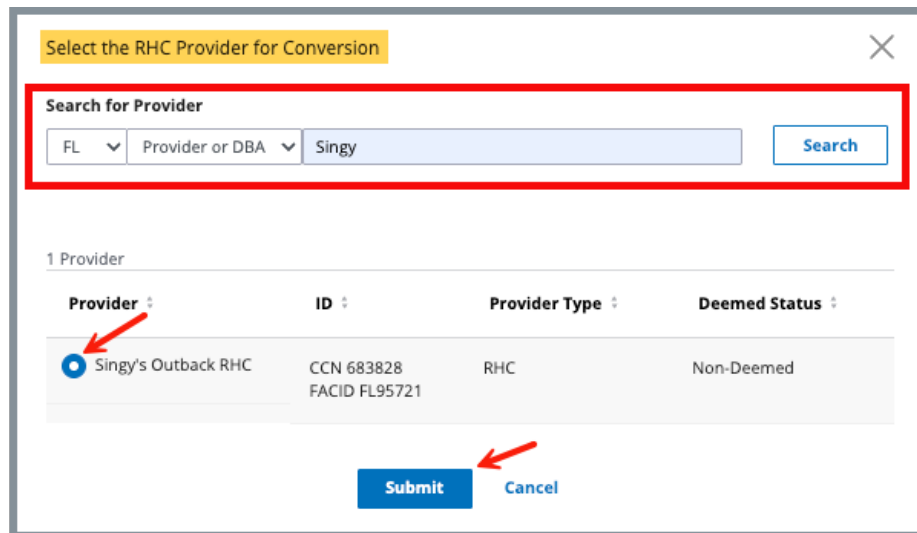
The screenshot shows the 'Operating Details' form with the following fields and controls:

- 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:** Indicator that the provider has non-standard operating hours.
- Bankrupt:** 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 greyed-out dropdown menu with a help icon.
- Find Facility:** A blue button with a red arrow pointing to it.
- Save:** A greyed-out button.
- Cancel:** A blue button.

*Figure 61: Find Provider for Conversion*

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

18.3.4 Select the radio button next to the provider. See *Figure 62, Select RHC Provider for Conversion*.



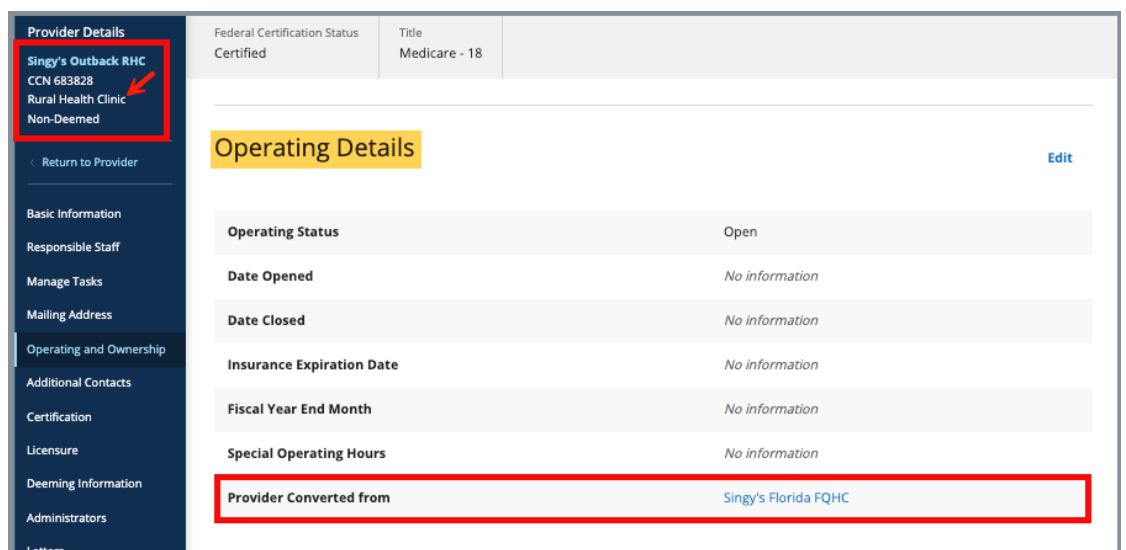
*Figure 62: Select RHC Provider for Conversion*

18.3.5 Click **Submit**.

18.3.6 Click **Save**.

18.3.7 Verify **Provider Conversion** is correct in both original provider and converted provider. See *Figure 63, Provider Conversion From FQHC* and *Figure 64, Provider Conversion To RHC*.

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



*Figure 63: Provider Conversion From FQHC*

The screenshot displays the 'Provider Details' page for Singy's Florida FQHC. The left sidebar contains navigation links: 'Return to Provider', 'Basic Information', 'Responsible Staff', 'Manage Tasks', 'Mailing Address', 'Operating and Ownership', 'Additional Contacts', 'Certification', 'Licensure', 'Administrators', 'Letters', and 'Notes'. The main content area shows 'Federal Certification Status' as 'Pending Certification' and 'Title' as 'No information'. Below this is the 'Operating Details' section, which includes fields for 'Operating Status' (Open), 'Date Opened', 'Date Closed', 'Insurance Expiration Date', 'Fiscal Year End Month', and 'Special Operating Hours', all with 'No information' values. A red box highlights the 'Provider Conversion To' field, which is set to 'Singy's Outback RHC (683828)'.

Field	Value
Federal Certification Status	Pending Certification
Title	No information
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 Conversion To	Singy's Outback RHC (683828)

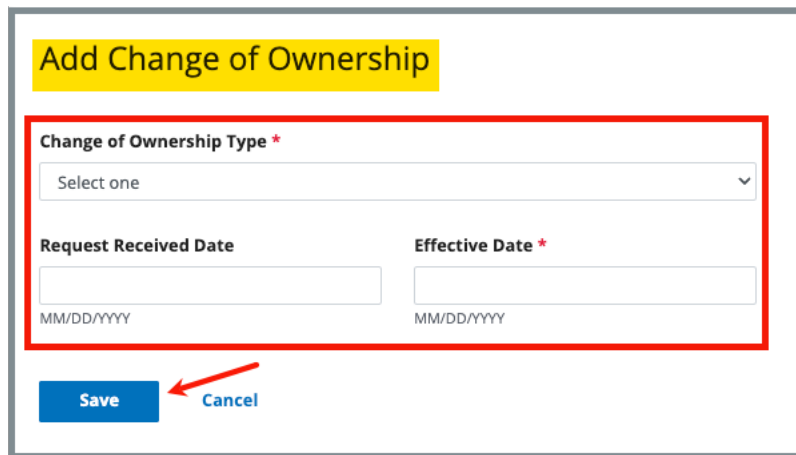
Figure 64: Provider Conversion to an RHC

## 18.4 Change of Ownership (CHOW)

- 18.4.1 Click **Operating and Ownership** on the **Provider Basic Information page**.
- 18.4.2 Click **Add CHOW Record**. See *Figure 65, Add CHOW Record*. The **Add Change of Ownership** window opens. See *Figure 66, Add Change of Ownership*.



*Figure 65: Add CHOW Record*



*Figure 66: 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 67, 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 67: 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 68, 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	<a href="#">Edit</a>

*Figure 68: With Assignment CHOW Record*

**Without Assignment**

- a. Select **Without Assignment** (see *Figure 69, 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 69: 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 70, 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 70: 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 71, Without Assignment CHOW Record*.

Change of Ownership

[Add CHOW Record](#)

Type	Related Provider	Request Received	Effective Date	Actions
Without Assignment	<a href="#">2.21.22 315pm</a> - CCN 01C0000004	<i>No information</i>	12/01/2023	<a href="#">Edit</a>

**Figure 71: Without Assignment CHOW Record**

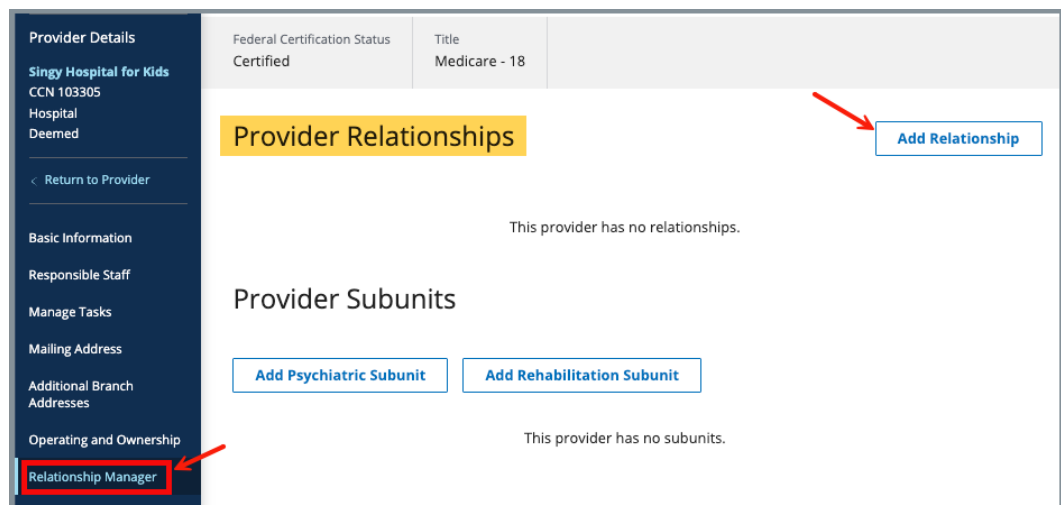
# 19. Relationship Manager

**Note:** Relationship Manager is enabled for the Hospital provider type only.

## 19.1 Provider Relationships

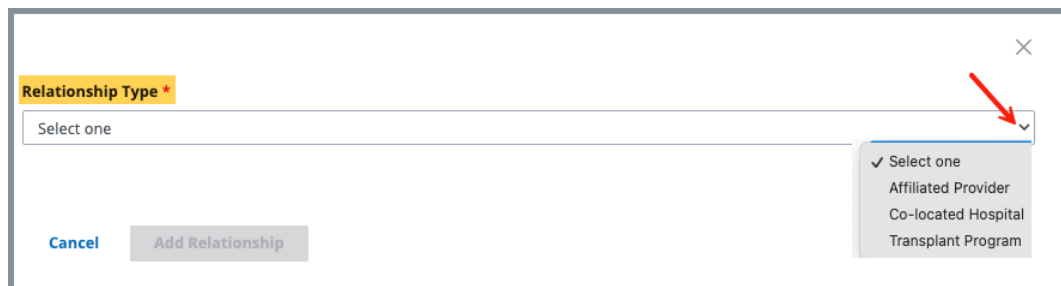
19.1.1 Click **Relationship Manager** on the left menu of the **Provider Basic Information** page. See *Figure 72, Relationship Manager*. The **Provider Relationships** window opens.

**Note:** Existing provider relationships appear under **Provider Relationships**.



*Figure 72: Relationship Manager*

19.1.2 Click **Add Relationship**. The **Relationship Type** pop-up window opens. See *Figure 73, Relationship Type Pop-Up Window*.



*Figure 73: Relationship Type Pop-Up Window*

19.1.3 Select **Relationship Type** from the drop-down menu. The Search for Provider fields open. See *Figure 74, Search for Provider Fields*.

**Relationship Type \***  
 Affiliated Provider

**Search for Provider**

FL Provider or DBA Singy **Search**

4 Providers

Provider	ID	Provider Type	Deemed Status
<input type="radio"/> Singy ESRD	CCN 102345 FACID FL75831	ESRD	Non-Deemed
<input type="radio"/> Singy's High Road	FACID FL29384	HHA	Non-Deemed
<input type="radio"/> Singy's Florida FQHC	FACID FL20934	FQHC	Non-Deemed
<input type="radio"/> Singy's Outback RHC	CCN 683828 FACID FL95721	RHC	Non-Deemed

Cancel **Add Relationship**

*Figure 74: Search for Provider Fields*

19.1.4 Click radio button next to desired provider.

19.1.5 Click **Add Relationship**. The **Provider Relationship** page updates. See *Figure 75, Provider Relationships*.

**Notes:**

- **Add Relationship** is disabled until a **Relationship Type** and **Provider** are selected.
- Additional relationships can be added. Click **Add Relationship** to add additional relationships.
- Click **Delete** to delete a relationship. Be aware that **Delete** immediately deletes the provider relationship. There is no confirmation window.

The screenshot shows a web interface titled "Provider Relationships". In the top right corner, there is a blue button labeled "Add Relationship". Below this is a table with the following columns: "Relationship Type", "Provider", "ID", "Provider Type", and "Certification Status". The table contains one row of data for an "Affiliated Provider" named "Singy's Outback RHC" located at "123 Main St, Fleming Island, Florida 32003". The "ID" column lists "CCN 683828" and "FACID FL95721". The "Provider Type" is "RHC" and the "Certification Status" is "Certified". A blue "Delete" link is visible at the end of the row.

Relationship Type	Provider	ID	Provider Type	Certification Status
Affiliated Provider	Singy's Outback RHC 123 Main St Fleming Island, Florida 32003	CCN 683828 FACID FL95721	RHC	Certified

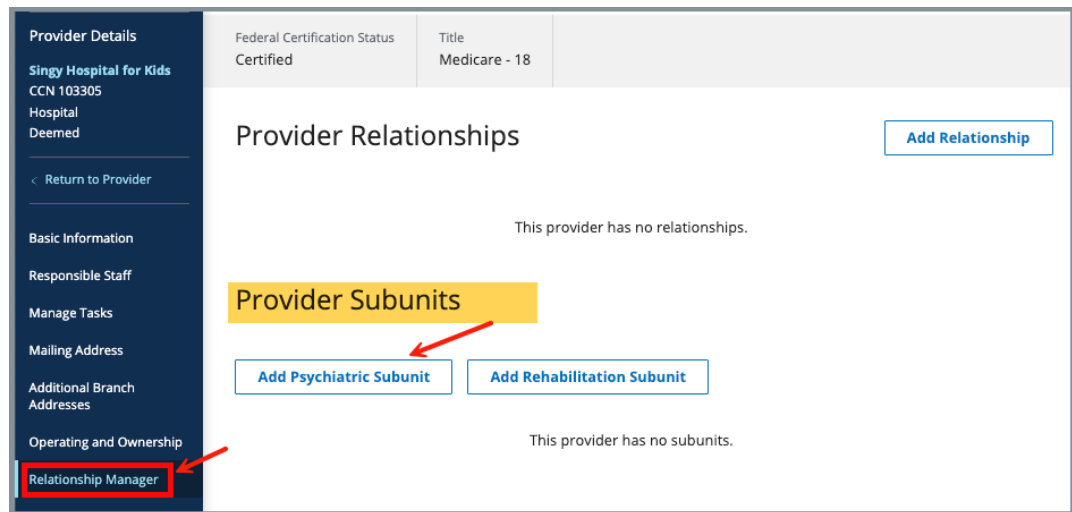
*Figure 75: Provider Relationships*

## 19.2 Provider Subunits

### Notes:

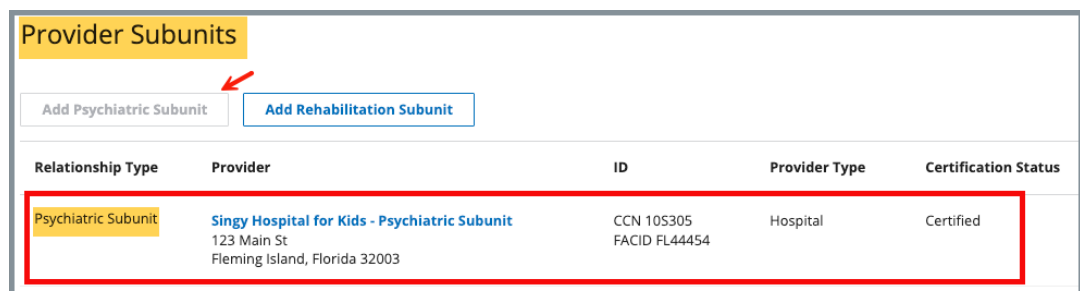
- Subunits cannot be deleted once created.
- Only one subunit of each type can be added.

19.2.1 Click **Relationship Manager** on the left menu of the **Provider Basic Information** page. See *Figure 76, Relationship Manager*. The **Provider Subunits** window opens.



*Figure 76: Provider Subunits*

19.2.2 Click **Add Psychiatric Subunit** to add a psychiatric subunit. The psychiatric subunit is immediately created and shows below. See *Figure 77, Psychiatric Subunit*.



*Figure 77: Psychiatric Subunit*

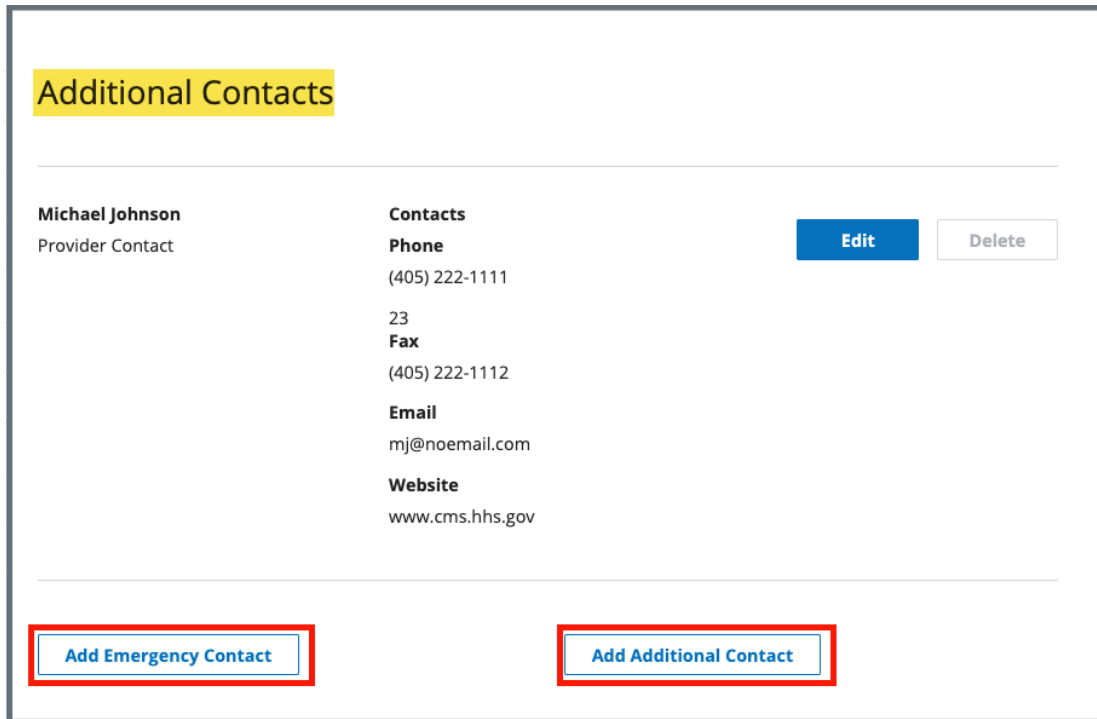
19.2.3 Click **Add Rehabilitation Subunit** to add a rehabilitation subunit. The rehabilitation subunit is immediately created and shows below. See *Figure 78, Rehabilitation Subunit*.

Provider Subunits				
Add Psychiatric Subunit		Add Rehabilitation Subunit		
Relationship Type	Provider	ID	Provider Type	Certification Status
Psychiatric Subunit	Siny Hospital for Kids - Psychiatric Subunit 123 Main St Fleming Island, Florida 32003	CCN 105305 FACID FL44454	Hospital	Certified

**Figure 78: Rehabilitation Subunit**

## 20. Additional Contacts

Once one additional contact is listed, the **Edit**, **Add Emergency Contact**, and **Add Additional Contact** buttons appear. See *Figure 79, Edit, Add Emergency Contact and Add Additional Contact Buttons*.



*Figure 79: Edit, Add Emergency Contact and Add Additional Contact Buttons*

## 20.1 Add First Additional Contact

- 20.1.1 Click **Additional Contacts** on the **Provider Basic Information** page. See *Figure 80, Provider Additional Contacts*. The **Additional Contacts** window opens.

The screenshot shows the 'Additional Contacts' form. The left sidebar contains a navigation menu with the following 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.' The form fields are: 'Contact Name' (text input), 'Contact Type' (dropdown menu with 'Primary' selected), 'Phone' (text input), 'Ext' (text input), 'Fax' (text input), 'E-Mail' (text input), and 'Website' (text input). A 'Save' button is located at the bottom left of the form, with a red arrow pointing to it.

*Figure 80: Provider Additional Contacts*

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

## 20.2 Edit Additional Contacts

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

20.2.2 Fill out the information.

20.2.3 Click **Save**.

## 20.3 Add Emergency Contact

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

20.3.2 Fill out the information.

20.3.3 Click **Save**.

## 20.4 Add Additional Contact After One Contact has been Added

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

20.4.2 Fill out the information.

20.4.3 Click **Save**.

## 21. 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.
- **Certification Date:**
  - The **Certification Date** derives from the most recent survey exit date and is editable for nondeemed Providers.
  - The **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](#).
- **ESRD:**
  - ESRDs have an additional status of **Denied Certification**.
  - The **Emergency/Vacation** radio button is only for the **ESRD SPRDF** subtype.
- **Hospitals:** Shows the OPTN code under **Federal Certification**.
- **OPO:** OPO provider types can view the OPO QCOR Public Report. Click the link on the Certification page. See *Figure 81, OPO QCOR Public Report Link*.

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



Figure 81: OPO QCOR Public Report Link

## 21.1 Certification Information

21.1.1 Click **Certification** on the **Provider Basic Information** page. See *Figure 82, Provider Federal Certification Details*. The **Certification** window opens with details on the certification and the certification history.

The screenshot shows the 'Certification' page for a provider. The left sidebar contains a navigation menu with 'Certification' highlighted. The main content area is titled 'Certification' and includes an 'Edit' button. Below this is the 'Federal Certification' section, which contains a table of details. Below that is the 'Certificate of Need' section, which states that certificates of need can be uploaded in provider attachments and that there are no certificates of need for this provider. At the bottom is the 'Certification History' section, which contains a table of certification records.

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 82: Provider Federal Certification Details

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

21.1.3 Update information as needed.

**Notes:**

- **Self Attestation** is available for the OPT/SLP, CORF, PXR, and RHC provider types. Review [Self Attestation](#) below for details.
- Once assigned, the CCN cannot be changed.
- Only ESRD provider types show the **Certificate of Need**.

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

## 21.2 Self Attestation

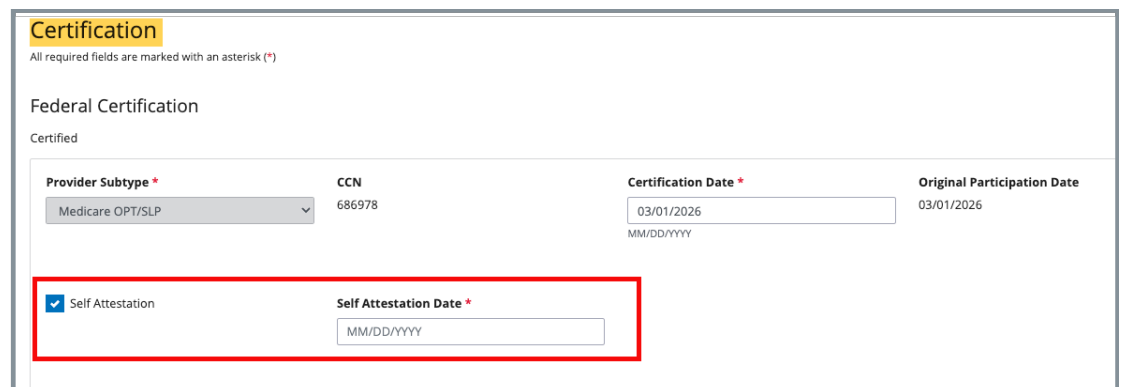
### Notes:

- The **Self Attestation** fields are disabled until a self attestation is uploaded in Attachments.
- PRTF provider type requires a self attestation, but does not require a **Certification** page update. Upload the PRTF self attestation in **Attachments**.

21.2.1 Upload a self attestation in **Attachments**. Review [Letters, Notes, Attachments User Manual](#) for details on how to upload an attachment, if needed.

21.2.2 Click **Certification** on the left menu.

21.2.3 Check **Self Attestation**. The **Self Attestation Date** becomes available. See *Figure 83, Self Attestation*.



The screenshot shows a web form titled "Certification" with a sub-section "Federal Certification". Below this, there is a "Certified" section containing several fields: "Provider Subtype" (a dropdown menu with "Medicare OPT/SLP" selected), "CCN" (text input with "686978"), "Certification Date" (text input with "03/01/2026" and a "MM/DD/YYYY" label below it), and "Original Participation Date" (text input with "03/01/2026"). Below these fields, there is a "Self Attestation" section. This section contains a checked checkbox labeled "Self Attestation" and a "Self Attestation Date" text input field with a "MM/DD/YYYY" label below it. A red rectangular box highlights the "Self Attestation" checkbox and the "Self Attestation Date" field.

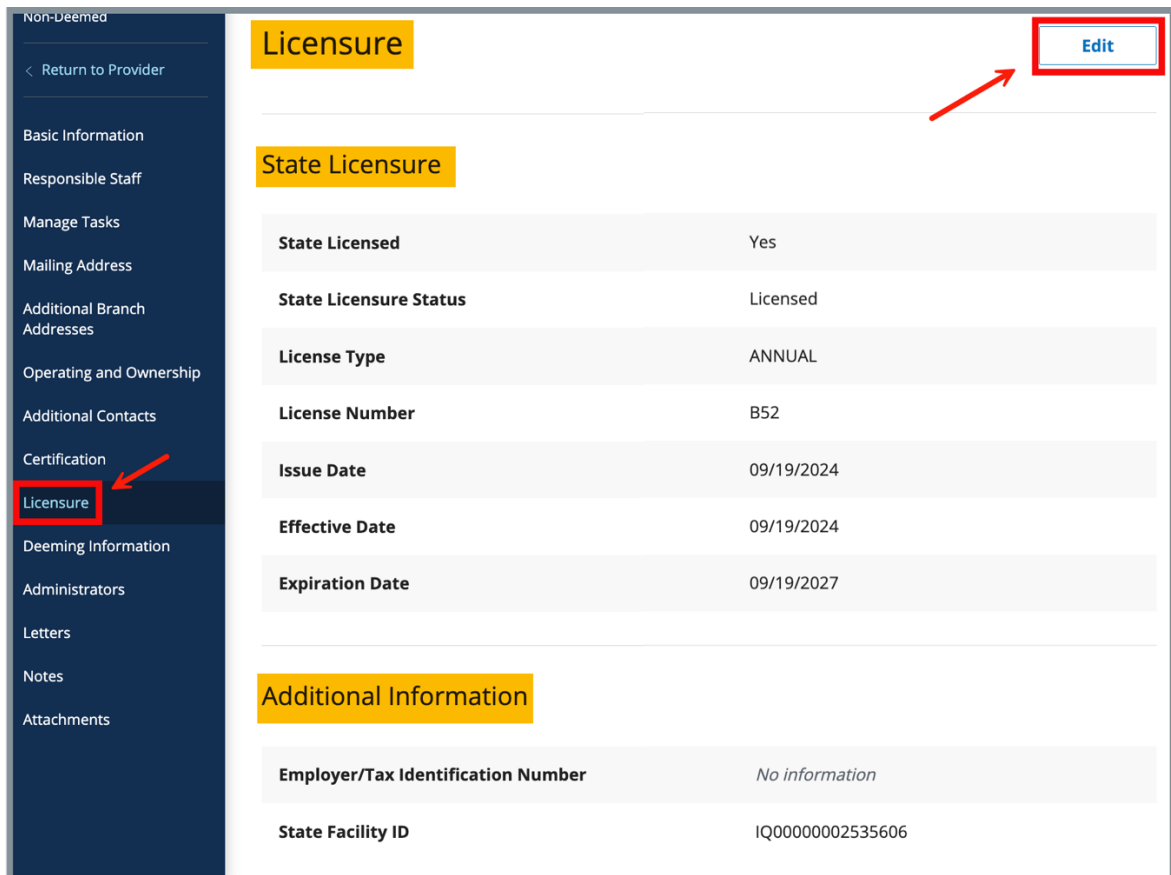
*Figure 83: Self Attestation*

21.2.4 Type the **Self Attestation Date**.

21.2.5 Click **Save**.

## 22. Licensure

**22.1** Click **Licensure** on the **Provider Basic Information** page. See *Figure 84, Provider Federal Certification Details*. The **Licensure** window opens.



*Figure 84: Provider Federal Certification Details*

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

**22.3** **Update** information as needed.

**Notes:**

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

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

## 23. Accreditation

**Note:** Accreditation is enabled for the PRTF provider type only.

**23.1** Click **Accreditation** on the **Provider Basic Information** page. See *Figure 85, Accreditation* and *Table 6, Accreditation Detailed Callout*. The **Accreditation** window opens.

**Figure 85: Accreditation**

**Table 6: Manage Tasks Detailed Callout**

No.	Description
a	Shows the accreditation status and date
b	Add additional accreditation organizations (AO)
c	List of current accrediting organizations
d	Click <b>Edit</b> to update existing AO information

**23.2** Click **Add Accreditation Organization** to add an AO. The **Add Accreditation Organization** opens. See *Figure 86, Add Accreditation Organization*.

**Add Accrediting Organization**

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

**Accrediting Organization \***

Commission on Accreditation of Rehabilitation Facilities (CARF)

**AO Facility ID**

**Accreditation Status \***

Pending

Accredited

Withdrawn

Loss of Accreditation Status

Expired

**Accreditation Date \***

06/10/2026

MM/DD/YYYY

**Expiration Date \***

06/10/2029

MM/DD/YYYY

**Save Section**

*Figure 86: Add Accreditation Organization*

**23.3** Fill out information.

**Note:** Select **Other** from the **Accrediting Organization** drop-down menu to enter a custom AO. The **Other Accreditation Organization Name** field opens and a custom AO can be added.

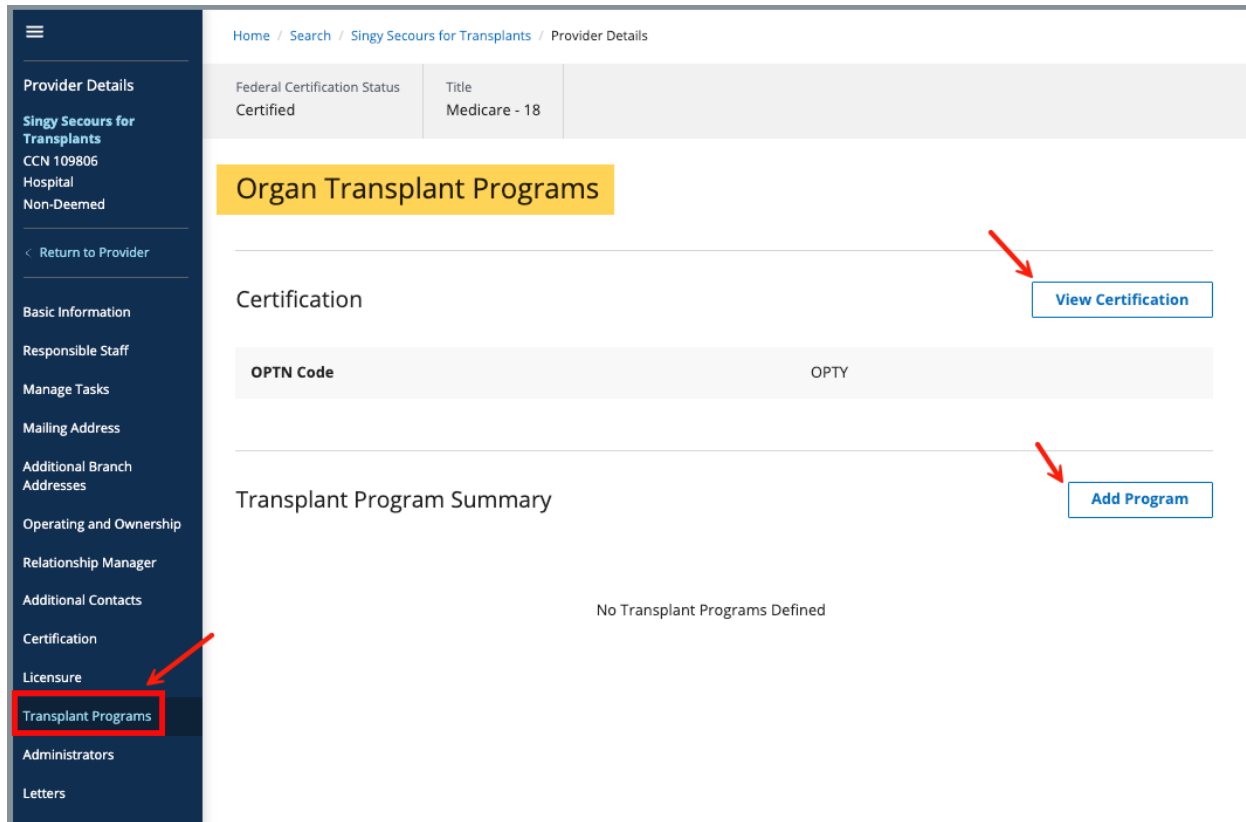
**23.4** Click **Save Section**. The **Accrediting Organizations** page re-opens and the AO is shown.

**Note:** A list of AOs is shown when there is more than one AO. There is an **Edit** button for each AO.

## 24. Transplant Programs

**Note:** Transplant Programs is enabled for the Hospital provider type with **Organ Transplant Programs** subtype only.

Click **Transplant Programs** on the **Provider Basic Information** page. See *Figure 87, Organ Transplant Programs*. The **Organ Transplant Programs** window opens.



**Figure 87: Organ Transplant Programs**

## 24.1 Certification

24.1.1 Click **View Certification** to go to the [Certification](#) page and view the certification information.

**Note:** The **OPTN Code** is generated on the [Certification](#) page.

24.1.2 Click **Transplant Programs** on the left menu to return to the **Organ Transplant Programs** page.

## 24.2 Transplant Program Summary

24.2.1 Click **Add Program** to go to the **Add Transplant Program** page. See *Figure 88, Add Transplant Program*.

**Add Transplant Program**

**Program Type \***

**Program Status \***

**Original Medicare Approval Date**  
  
MM/DD/YYYY

---

Application Information

**Date Application is Received**  
  
MM/DD/YYYY

**Additional fields below**

*Figure 88: Add Transplant Program*

#### 24.2.2 Fill out the information.

**Notes:**

- A **Pediatric Pancreas Program Type** must also have an approved **Pediatric Kidney Program Type**.
- An **Adult Pancreas Program Type** must also have an approved **Adult Kidney Program Type**.
- A **Pediatric Intestine Multivisceral Program Type** must also have an approved **Pediatric Liver Program Type**.
- An **Adult Intestine Multivisceral Program Type** must also have an approved **Adult Liver Program Type**.

#### 24.2.3 Click **Save**. The **Transplant Program Summary** page opens with the program information. See *Figure 89, Transplant Program Summary* and *Table 7, Transplant Program Summary Detailed Callout*.

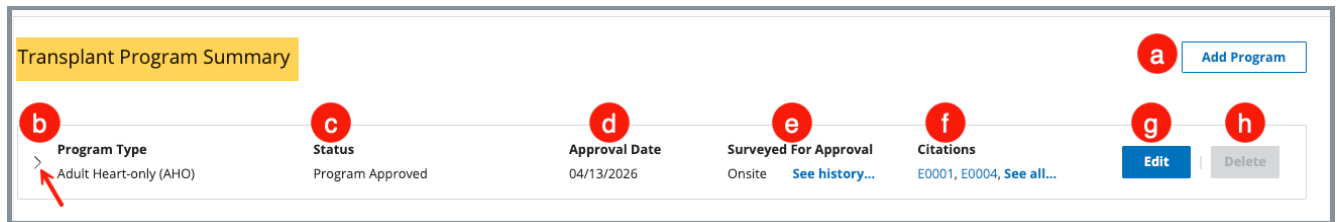


Figure 89: Transplant Program Summary

Table 7: Transplant Program Summary Detailed Callout

No.		Description
a	<b>Add Program</b>	Click to add additional transplant programs
b	<b>Program Type</b>	Click the caret to view program details
c	<b>Status</b>	Program status
d	<b>Approval Date</b>	Original Medicare approval date
e	<b>Surveyed for Approval</b>	Click <b>See history...</b> to open <b>Transplant Program Surveyed History</b> pop-up window. See <i>Figure 90, Transplant Program Surveyed History</i> . The <b>Survey Track</b> is a clickable link.
f	<b>Citations</b>	Click any citation to review citation (links to the citation on the survey page) or click <b>See all</b> to see all associated citations. See <i>Figure 91, Transplant Program Citations</i> .
g	<b>Edit</b>	Click <b>Edit</b> to edit program details. <b>Note: Program Type</b> cannot be edited.
h	<b>Delete</b>	Click <b>Delete</b> to delete the program. A pop-up window opens to confirm deletion. <b>Note: Delete</b> is disabled when surveys or citations are attached.

**Transplant Program Surveyed History**

Adult Heart-only (AHO)

Survey Track	Start Date	Exit Date	Surveyed for Approval
<a href="#">32F4E1</a>	04/02/2026	No information	Onsite

Figure 90: Transplant Program Surveyed History

**Transplant Program Citations**

Adult Heart-only (AHO)

- E0001: Establishment of the Emergency Program (EP)
- E0004: Develop EP Plan, Review and Update Annually
- E0006: Plan Based on All Hazards Risk Assessment
- X0014: TERMINATION OF AGREEMENT WITH OPO

Figure 91: Transplant Program Citations

## 25. Deeming Information

---

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

**Notes:**

- 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.
- Not all provider types have deeming.

### 25.1 View Deeming Information

Click **Deeming Information** on the **Provider Basic Information** page. See *Figure 92, 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.

<b>Current Deemed Accreditation Status</b>	Deemed
<b>Current Deemed Accreditation Date</b> ⓘ	05/01/2023
<b>CMS Approval of Deemed Status Date</b> ⓘ	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](#)

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

Figure 92: Deeming Information Details

## 25.2 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 93, 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
<a href="#">11710A-H1</a>	Health	Recertification	05/02/2023	Writing in progress

*Figure 93: State Survey Jurisdiction Details*

## 25.3 Add Accrediting Organization

25.3.1 Click **Add Accrediting Organization** on the [Deeming Information](#) page. The **Add Accrediting Organization** window opens. See *Figure 94, 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 94: Add Accrediting Organization*

25.3.2 Fill out the applicable information.

25.3.3 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.

## 26. Performance

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

**26.1** Click **Performance** on the **Provider Basic Information** page. See *Figure 95, Performance*. The **Performance** window opens.

The screenshot shows the 'Performance' page for 'Marlon Manor Nursing Home Inc'. The left sidebar lists various navigation options, with 'Performance' highlighted. The main content area is titled 'Performance' and contains several form fields: 'Program Selection \*', 'Date Selected for Program \*', 'Program Status', 'Survey Cycle \*', 'Survey Due Date \*', and 'Status Changed Date \*'. Below these fields is a 'Notes' section with a text editor. A 'Save' button is located at the bottom left of the form area. Red arrows point to the 'Performance' menu item and the 'Save' button.

*Figure 95: Performance*

**26.2** Fill out the information.

**26.3** Click **Save**. The **Performance** page updates with Performance and Special Focus details. The page can be viewed and edited. See *Figure 96, 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

---

<b>Program Selection</b>	Nursing Home Special Focus
<b>Date Selected for Program</b>	09/19/2024
<b>Special Focus Status</b>	Active
<b>Survey Cycle</b>	6 Months
<b>Survey Due Date</b>	10/03/2024

Last edit by: NH\_CMSGU\_Singy  
09/19/2024

Doris Schutt has asked us to review performance.

---

Special Focus Details

<b>Months as Special Focus</b>	1
<b># of Surveys Since in Special Focus</b>	0
<b>Most Recent Survey</b>	No information
<b># of Citations in Most Recent Survey</b>	No information
<b># of Surveys With IJ Cited</b>	0

Related Survey History
Related Intakes
Related Enforcements
All Citations

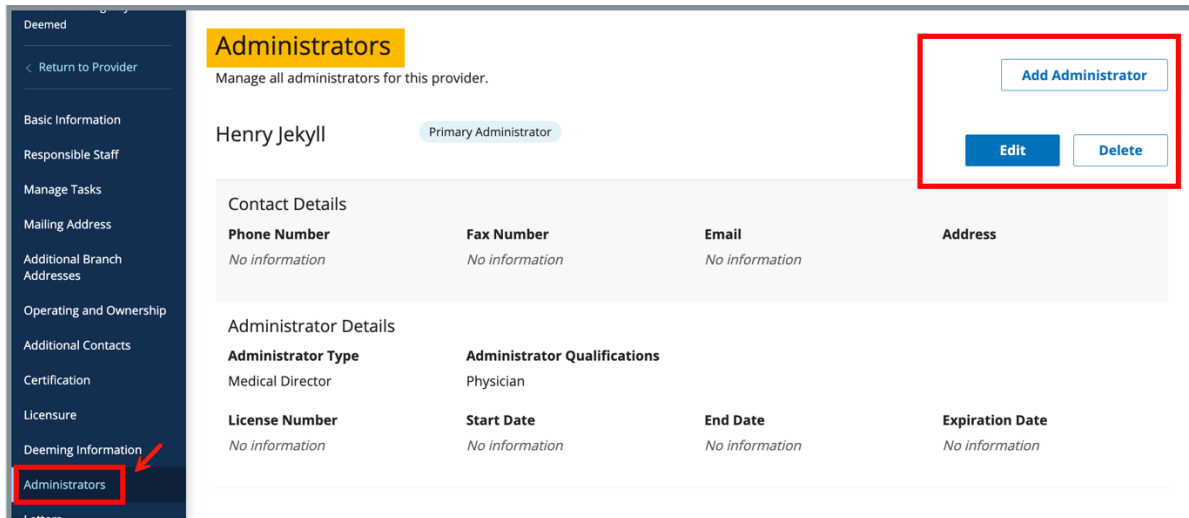
Survey ID	Survey Date	Survey Category	Met/Not Met Survey	
<a href="#">12345D-H1</a>	00/00/0000	Recertification	✔ Met	Active
<a href="#">12345D-H1</a>	00/00/0000	Recertification	✘ Not Met	Active
<a href="#">12345D-H1</a>	00/00/0000	Complaint	✘ Not Met	Active
<a href="#">12345D-H1</a>	00/00/0000	Recertification	✔ Met	Active

Figure 96: 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.

## 27. Administrators

**27.1** Click **Administrators** on the **Provider Basic Information** page. See *Figure 97, Add Administrator*. The **Add Administrator** window opens.



*Figure 97: Add Administrator*

**27.2** Fill out the information.

### Notes:

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

**27.3** 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.

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

## 28. Bed Summaries

**Purpose:** To manage bed summaries for the provider.

**Note:** **Bed Summaries** is enabled for the Nursing Home and PRTF provider types only.

**28.1** Click **Bed Summaries** on the **Provider Basic Information** page. See *Figure 98, 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 navigation 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', 'Medicare/Medicaid', 'Medicaid', 'ICF/IID', and 'Licensed Only' (each with an input field), 'Total Facility Beds' (with a dropdown arrow and value '0'), and 'Total Certified Beds' (with a dropdown arrow and value '0'). At the bottom is a 'Save' button, with a red arrow pointing to it.

*Figure 98: Add Bed Summary*

**28.2** Fill out the information.

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

**28.3** Click **Save**. The **Bed Summaries** page updates. The page can be viewed and edited. See *Figure 99, 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
<b>Licensed Only</b>			
30			
<b>Bed Summary Totals</b>			
<b>Total Facility Beds</b>	<b>Total Certified Beds</b>		
95	65		

*Figure 99: Bed Summaries*

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

## 29. Letters, Notes, Attachments

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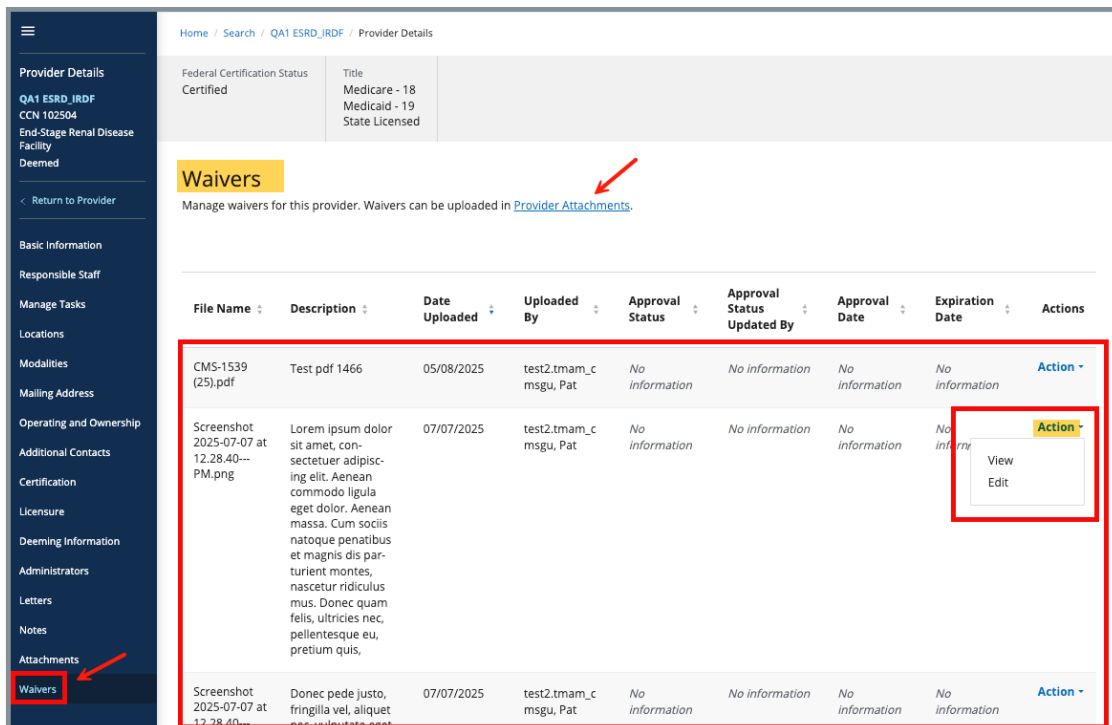
**Note:** Letters, Notes, and Attachments information can be found in the S&C User Manual: Letters, Notes, and Attachments on [QTSO](#).

## 30. 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**.

**30.1** Click **Waivers** on the **Provider Basic Information** page. See *Figure 100, Waivers*. The **Waivers** window opens.



*Figure 100: Waivers*

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

**Note:** Only a CMSGU can edit the waiver.

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

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

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

**30.5** Add approval date and approval expiration date, if waiver is approved.

**30.6** Click **Save**.

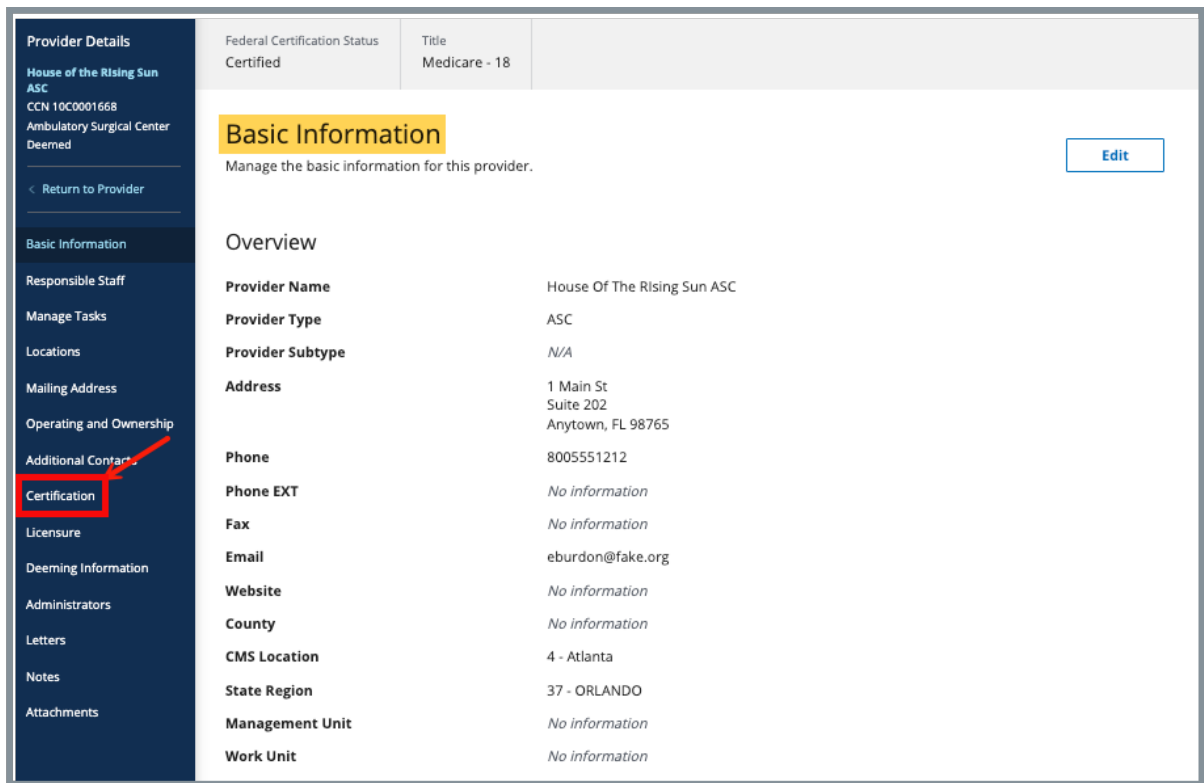
# 31. Terminate a Provider

**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.

**31.1** Click **Certification** from the **Provider Basic Information** page. See *Figure 101, Certification Left Menu*. The **Certification** page opens.



*Figure 101: Certification Left Menu*

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

**31.3** Click **Terminated** under **Federal Certification Status**. See *Figure 102, Federal Certification Voluntary Withdrawal Status*. Additional fields open under **Federal Certification**.

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

**Federal Certification**

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

**Federal Certification Status \***

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

*Figure 102: Federal Certification Status*

**31.4** 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 103, Federal Certification Involuntary Withdrawal Details*.

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

**Federal Certification**

**Withdrawal Type \***

- Involuntary Withdrawal
- Voluntary Withdrawal

**Termination Date \***      **Reason \***

03/04/2025      Select one

MM/DD/YYYY

**Federal Certification Status \***

- Not Applicable
- Pending Certification
- Certified
- Terminated

*Figure 103: Federal Certification Involuntary Withdrawal Details*

- b. Select the reason for termination from the drop-down menu under **Reason**. See *Figure 104, 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". A red box highlights the "Reason" dropdown and its options.

*Figure 104: Termination Reason*

- c. Click **Save**. A pop-up window opens to verify whether the certification should be terminated. See *Figure 105, Termination Pop-Up Window*.

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

*Figure 105: Termination Pop-Up Window*

- d. Click **Confirm**.
- e. Verify that **Federal Certification Status** is now **Terminated**. See *Figure 106, Federal Certification Involuntary Withdrawal Status*.

The screenshot shows a web interface for Federal Certification. At the top, a box highlights the status 'Terminated' under 'Federal Certification Status' and 'No information' under 'Title'. 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:

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

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

**Figure 106: Federal Certification Involuntary Withdrawal Status**

## Voluntary Withdrawal

- a. Select the termination date under **Termination Date**. See *Figure 107, 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

Save Cancel

*Figure 107: 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 108, Termination Pop-Up Window*.

Are you sure you want to terminate this certification?

Confirm Cancel

*Figure 108: Termination Pop-Up Window*

- d. Click **Confirm**.
- e. Verify that **Federal Certification Status** is now **Terminated**. See *Figure 109, Federal Certification Voluntary Withdrawal Status*.

**Federal Certification Status**  
Terminated

Title  
Medicare - 18

**Certification** Edit

**Federal Certification**

<b>Withdrawal Type</b>	Voluntary Withdrawal
<b>Termination Date</b>	01/22/2026
<b>Reason</b>	Provider Conversion
<b>CCN</b>	686973
<b>Title</b>	Medicare - 18

**Certification History**

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 109: Federal Certification Voluntary Withdrawal Status**