



Centers for Medicare & Medicaid Services

# Internet Quality Improvement & Evaluation System (iQIES)

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## Survey and Certification (S&C) Offline User Manual

**Version 1.1**  
**April 17, 2024**

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# 1. Introduction

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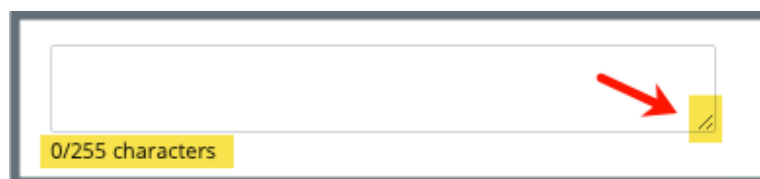
This manual addresses the process necessary to perform certain functions in iQIES when no network connection is available.

For information on S&C 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 [HARP](#) (Health Care Quality Information Systems (HCQIS) Access Roles and Profile) 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 be different from what is shown in screenshots below.
- Screenshots are dependent on user role and may not be an exact representation.
- Words highlighted in blue in this document 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 15 minutes of nonuse and reverts to the login page. Be sure to save data regularly. iQIES remains up and active as long as it is in use.
- Below are the supported browsers for access to iQIES. **Do not use Internet Explorer.** It is not supported. Be sure to keep your browser updated.

For best results, please use the latest version of these browsers:

[Chrome](#)

[Firefox](#)

The latest versions of the browsers below are also supported:

[Microsoft Edge](#)

[Safari](#)

## 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:  
[CCSQ Support Central](#)

**Idea Portal:** Feedback for future iQIES software development: [CCSQ Support Central](#). Click **Idea Portals**.

**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 S&C General User role 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 2, Help Icon*, for further information.



*Figure 2: Help Icon*

## 2. Function Availability Offline

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### 2.1 Functions Available for Offline Use

#### **Provider**

View all provider details

#### **Survey**

- View Basic Information
- View Responsible Staff
- View Teams
- Add, Edit, View Citations
- Add, Edit, View CMS-1539
- Add, Edit, View CMS-670 information
- Add, Edit, View CMS -1572, 377, 417, 643
- View Letters
- Add, Edit, View Notes

#### **Intakes**

- View Basic Information
- View Responsible Staff
- View Parties Involved
- Add, Edit, View Allegations
- View Triage
- View Survey page
- View Letters
- Add, Edit, View Notes
- Add, Edit, View Investigation Narrative

#### **Enforcements**

View all Enforcement details



## 2.2 Functions Not Currently Available for Offline Use

**Note:** Offline functions are continuously being enhanced. The manual will be updated and a communication sent out to all users when new functions are available.

- Statement of Deficiencies
- Plan of Correction
- Attachments

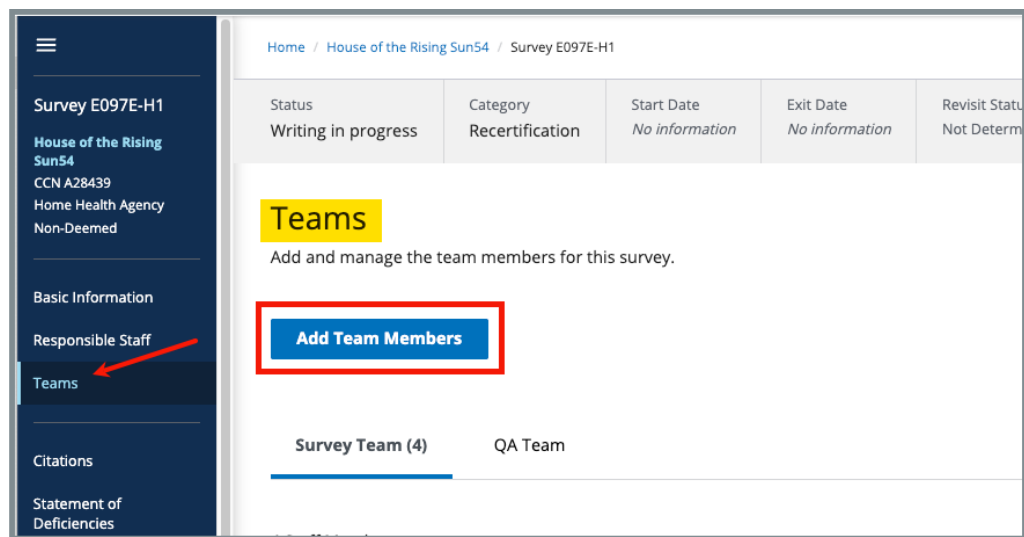
## 3. Offline Requirements

**Note:** These requirements must be made while online.

### 3.1 Survey Team Requirements

**Note:** A user must be a part of the survey's Survey Team before working offline.

- 3.1.1 Go to the **Basic Information** page of the survey that will be accessed offline.
- 3.1.2 Click **Teams** on the left menu. See *Figure 3, Teams*. The **Teams** page opens.



*Figure 3: Teams*

3.1.3 Click **Add Team Members**. The **Add Teams** window opens. See *Figure 4, Add Teams*.

*Figure 4: Add Teams*

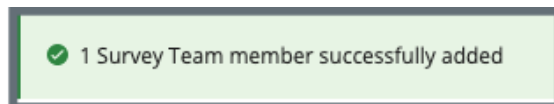
3.1.4 Type last name in text box under **Last Name**. Add first name to narrow down the results, if necessary.

**Notes:**

- It is only possible to add staff that are in the list of staff members.
- Only one staff can be primary.
- Click the arrow next to **Name** to sort names in alphabetical or reverse alphabetical order.

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

3.1.6 Check the box under **Select** next to the correct name. Click **Save**. A green notification box appears at the top of the screen, verifying the member was successfully added. See *Figure 5, Survey Team Member Successfully Added Popup*.



*Figure 5: Survey Team Member Successfully Added Popup*

## 3.2 Enable Offline

### Notes:

- This step must be performed prior to working offline.
- This step shows how to make a survey available offline. Follow the same steps to make a provider, intake, or enforcement available offline.

3.2.1 Click the iQIES logo on the top left of the screen or **Home** to go to the **Workload Management** landing page. See *Figure 6, iQIES Logo*. The **My Tasks Workload Management** page opens. See *Figure 7, Workload Management Landing Page*.

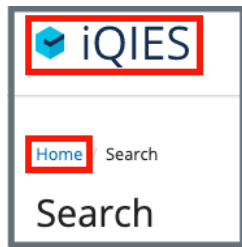


Figure 6: iQIES Logo

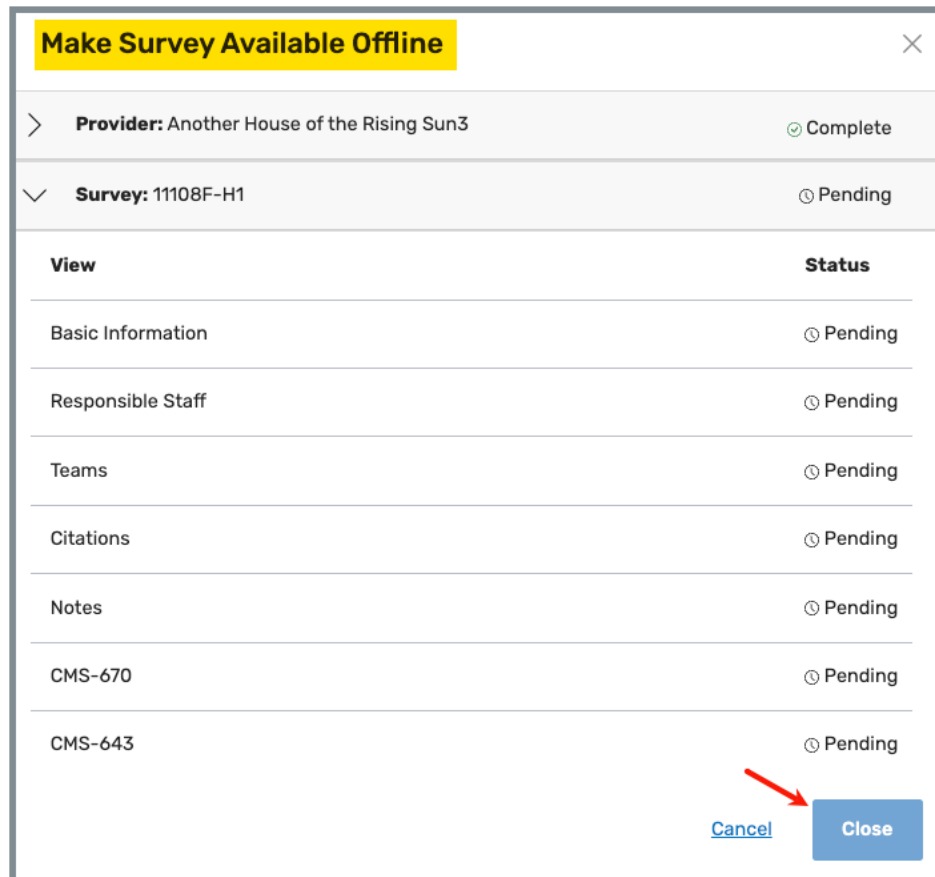
The image shows the 'My Tasks' workload management landing page. The page has a dark blue header with the 'My Tasks' title and a navigation bar with tabs for 'Providers', 'Surveys', 'Intakes', and 'Enforcements'. The 'Surveys' tab is selected. Below the header, there is a section titled 'My Surveys Tasks' with a dropdown menu for 'Active tasks'. A table lists survey tasks with columns for Survey ID, Provider, Category, Exit Date, Assigned Tasks, and Track Status. The first row is highlighted with a red box, and an 'Enable Offline' button is visible next to the Survey ID.

Survey ID	Provider	Category	Exit Date	Assigned Tasks	Track Status
1A6456-H1 <span>New</span> <a href="#">Enable Offline</a>	La Maison Suisse Deux 123 Main St Anytown, Florida 88990	Initial Certification	No information	Survey Team	<a href="#">1A6456</a> 0%
192B18-H1 <span>New</span> <a href="#">Enable Offline</a>	0 Lex HHA 123 sycamore66662, fake22 Tallahassee, Florida 75485	Sample Validation	No information		<a href="#">192B18</a> 0%
16E455-H1 <span>New</span> <a href="#">Enable Offline</a>	0 Lex Nursing Ctr 3525 W 42nd Miami, Florida 20202	Complaint, Recertification	No information	Survey Team	<a href="#">16E455</a> 0%
140BBA-H1 <a href="#">Enable Offline</a>	Adam Test Provider 1 123 Fooobar Ln Miami, Florida 12345	Initial Licensure, Initial Certification	03/25/2024	Survey Team	<a href="#">140BBA</a> 0%
AF1F4-H1 <a href="#">Enable Offline</a>	0 Lex HHA 123 sycamore66662, fake22 Tallahassee, Florida 75485	Vaccine Requirement, Initial Certification, Initial Licensure	04/16/2021	Survey Team	<a href="#">AF1F4</a> 100%

Figure 7: Workload Management Landing Page

3.2.2 Click **Enable Offline** next to the survey that will be worked offline. The **Make Survey Available Offline** window pops up. See *Figure 8, Make Survey Available Offline*.

**Important Note:** All linked provider details, intakes, and enforcements download with the survey.



*Figure 8: Make Survey Available Offline*

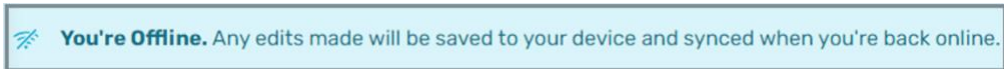
3.2.3 Click **Close**. The survey is now available offline.

**Note:** **Close** is active once status is **Complete**.

## 4. How to Verify the Computer is Offline

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- 4.1 Do not connect to the internet to go offline.
- 4.2 Go to the iQIES home page, which is the Workload Management screen.
- 4.3 Verify **there is** a blue notification banner **that** says You're Offline. See *Figure 9, You're Offline Notification Banner*.



*Figure 9: You're Offline Notification Banner*

### Notes:

- The **You're Offline Notification Banner** also appears when the system detects the computer is offline.
- The only items in **My Tasks** on the home page (**Workload Management** screen) are the items that were downloaded.