



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Survey and Certification (S&C) Offline User Manual

**Version 2.0
June 16, 2025**

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1. Introduction

This user manual addresses the processes necessary to perform Survey & Certification (S&C) Offline 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 [iQIES Onboarding Guide](#) for further information, if necessary.
- All screenshots included in this manual contain only test data. Current screens in iQIES may be different from what is shown in screenshots below.
- Screenshots are dependent on user role and may not be an exact representation.
- Words highlighted in blue are clickable links.
- A red asterisk (*) indicates a required field.
- Blank fields may have a limited number of characters allowed in that field. If so, the character limit is shown on the bottom left. The blank fields may also be expanded. Click the two 45° parallel lines and drag to the right to enlarge the box. See *Figure 1, Expandable Field*.

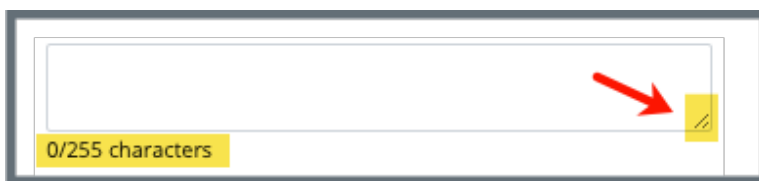


Figure 1: Expandable Field

- iQIES times out after 15 minutes of nonuse and reverts to the login page. Be sure to save data regularly. iQIES remains up and active if it is in use.
- iQIES uses a smart search. Once three letters/digits are typed in the search bar, results are shown based on letters/digits entered. The more letters/digits entered, the narrower the search. If any of the results is the correct result, click the result to open.

- Review any notification banners. Some banners may have links to review further information; others may be a reminder of a task that must be completed. See *Figure 2, Notification Banner* and *Table 1, Notification Banner Color Descriptions*. These banners can be closed (X'd out) at any time.

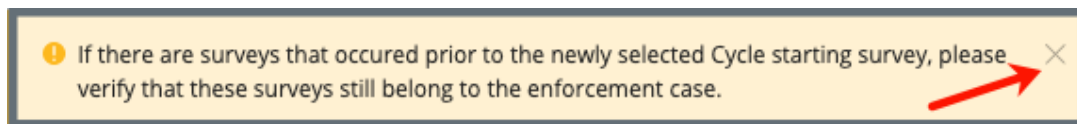


Figure 2: Notification Banner

Table 1: Notification Banner Color Descriptions

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

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

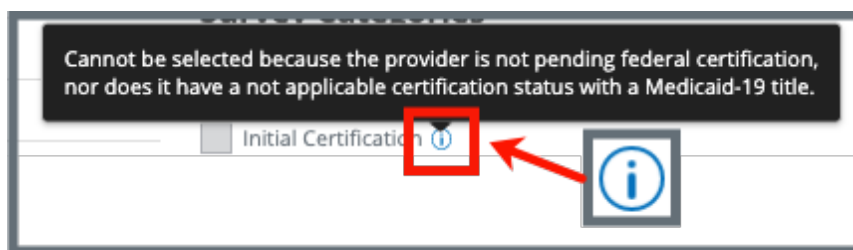


Figure 3: Tool Tip Icon

- Below are the supported browsers for access to iQIES. Be sure to keep your browser updated.

[Chrome](#)

[Edge](#)

1.2 iQIES Service Center

The iQIES Service Center supports users working within the various iQIES components: S&C, Patient Assessment, and Reporting.

Assistance Accessing iQIES: Contact the iQIES Security Official (SO) for your organization.

Technical Support: Contact the iQIES Service Center:

Phone: 888-477-7876 (select Option 1)

Email: iQIES@cms.hhs.gov

CCSQ Support Central: Create a new ticket or track an existing ticket:
https://cmsqualitysupport.servicenowservices.com/ccsq_support_central

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

More information on iQIES: Refer to the [QIES Technical Support Office](#) (QTSO) and the [Quality, Safety, & Education Portal](#) (QSEP). Logging in to HARP may be required before accessing some documentation in QTSO and QSEP.

iQIES reference materials include:

- Links to Training Videos for providers
- Assessment Management User Manual
- Quick Reference Guides
- Onboarding Guide
- Managing User Information
- Other helpful iQIES material

iQIES training materials on QSEP include S&C Foundation Series Videos

1.3 Roles and Permissions

iQIES roles allow users to access information pertinent to their area of work. The examples provided in this document pertain to S&C and 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

2. Function Availability Offline

The iQIES Offline Solution supports scenarios where the user may not have access to a reliable internet connection. iQIES can detect when you have lost internet and a banner appears informing you that you are Offline. You can keep working while offline in iQIES, and the system will save your changes. When connectivity is detected, iQIES will automatically sync your changes. The Enable Offline feature is synonymous with your team exporting their shell prior to going onsite.

This feature does not require manual data sharing. When connected to the internet, all team changes are saved real-time and are automatically available.

In scenarios where you are in a fully remote location with no internet connectivity or hotspot coverage, you can use the Export or Import functions. This solution should be considered the exception, and Wi-Fi sync should take place, when possible. If you are working in a location with no internet, and at different times, the team will need to compile all work together, so that the data can be exported and sent to the Team Coordinator.

The Team Coordinator receives the exported files, imports them, and exports a new file for the team to import and use. This file contains the team's collective data.

2.1 Functions Available for Offline Use

Provider

[View all provider details](#)

Survey

- [View Basic Information](#)
- [View Responsible Staff](#)
- [LTCSP Navigation](#)
- [View Teams](#)
- [Add, Edit, View Citations](#)
- [Add, Edit, View CMS-1539](#)
- [Add, Edit, View CMS-670, CMS 671 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
- Upload New 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 5, Teams*. The **Teams** page opens.

The screenshot shows the 'Teams' page for Survey 12B714-H1. The left sidebar contains a menu with items: Survey 12B714-H1, House of the Rising Sun54, CCN A28439, Home Health Agency, Deemed, Basic Information, Responsible Staff, Manage Tasks, Teams (highlighted with a red box and arrow), Citations, and Statement of Deficiencies. The main content area has a yellow header 'Teams' and text 'Add and manage the team members for this survey.' Below this, it says 'There are no team members for this survey.' A red box highlights the 'Add Team Members' button.

Figure 5: Teams

3.1.3 Click **Add Team Members**. The **Add Teams** window opens. See *Figure 6, Add Teams*.

The screenshot shows the 'Add Teams' window. It has a yellow header 'Add Teams' and tabs for 'Survey Team' and 'QA Team'. Below the tabs, it says 'Select staff members for this survey. The first staff member selected will be designated as team coordinator by default.' There are input fields for 'First Name', 'Last Name', and 'Organization'. A red box highlights the 'First Name' and 'Last Name' fields. Below these is a 'Disciplines' dropdown menu. A red arrow points to the 'Search' button.

Figure 6: 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 7, Survey Team Member Successfully Added Popup*.

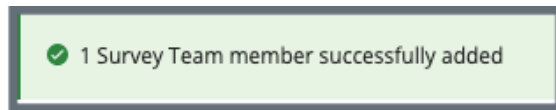


Figure 7: Survey Team Member Successfully Added Popup

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 **My Tasks** landing page. See *Figure 8, iQIES Logo*. The My Tasks page opens. See *Figure 9, My Tasks Landing Page*.



Figure 8: iQIES Logo

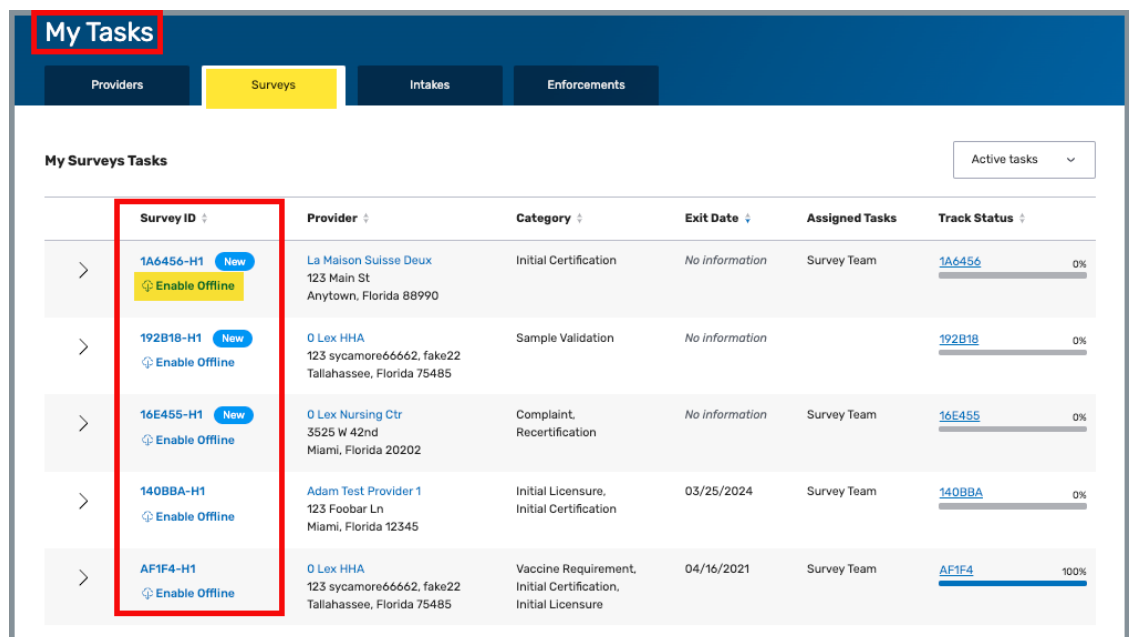


Figure 9: My Tasks Landing Page

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 10, Make Survey Available Offline*.

Important Note: All linked provider details, intakes, and enforcements download with the survey. This must be done while online and by each member of the team individually on their own devices.

Notes:

- It may take some time to download all information associated with the survey. Wait until the **Pending** status turns into **Complete** for each drop-down item.
- The users internet bandwidth and the size of the survey data that has an effect the duration of the download.
- **Close** is active once status is **Complete**.

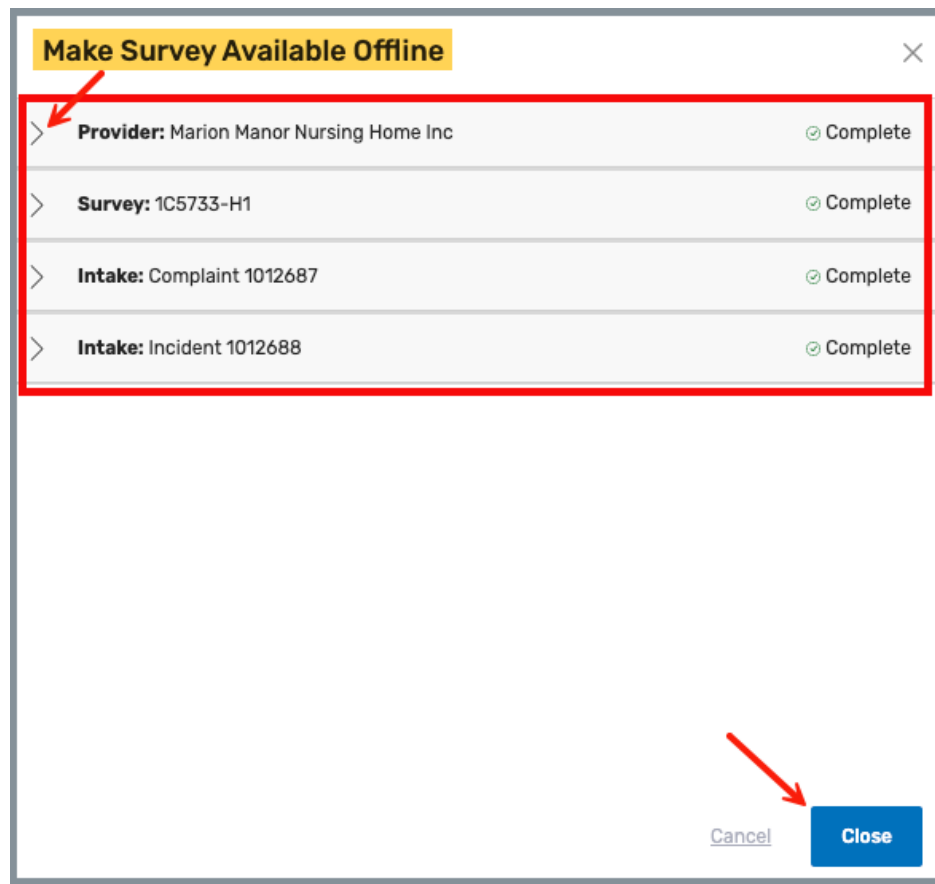


Figure 10: Make Survey Available Offline

3.2.3 Click the caret next to any item on the list to view details of the downloaded information. See *Figure 11, Downloaded Survey Details*.

Make Survey Available Offline

> **Provider:** Marion Manor Nursing Home Inc ✔ Complete

> **Survey:** 1C5733-H1 ✔ Complete

> **Intake:** Complaint 1012687 ✔ Complete

✓ **Intake:** Incident 1012688 ✔ Complete

View	Status
Basic Information	✔ Complete
Responsible Staff	✔ Complete
Parties Involved	✔ Complete
Allegations	✔ Complete
Allegations Create	✔ Complete

[Cancel](#) **Close**

Figure 11: Downloaded Survey Details

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

4. How to Verify the Computer is Offline

Important Note: This process is for testing purposes. If you want to verify that you are offline make sure you are not connected to the internet before you proceed.

4.1 Go to **My Tasks**.

Note: **My Tasks** is the iQIES home page.

4.2 Verify there is a notification banner that says **You're Offline**. See Figure 12, *You're Offline Notification Banner*.

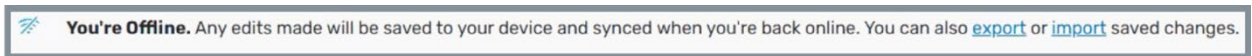


Figure 12: You're Offline Notification Banner

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.

5. Send the Updated File to the Team Coordinator (TC)

Purpose: To send (export) an updated file to the TC after work has been completed offline and needs to be updated in iQIES.

Note: This process is only available while working offline.

5.1 Click **export** on the [You're Offline Notification Banner](#) to send any updates to the TC.

5.2 The **Encrypt and download unsynchronized changes** pop-up window opens. See *Figure 13, Encrypt and Download Unsynchronized Changes Pop-Up Window*.

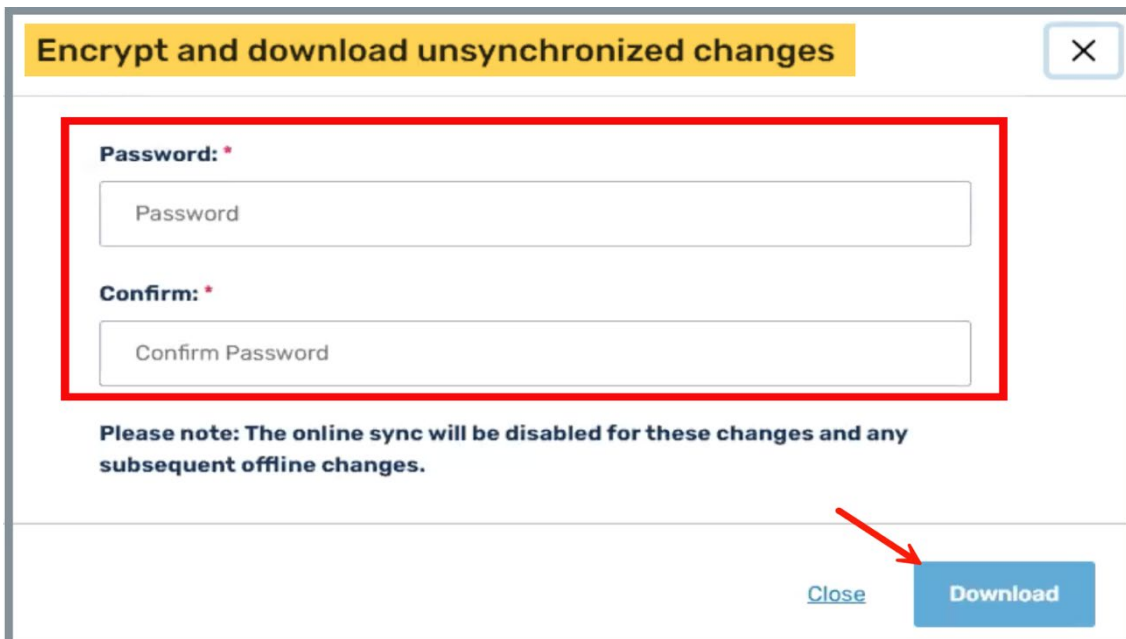


Figure 13: Encrypt and Download Unsynchronized Changes Pop-Up Window

5.3 Create a password.

Tip: Create a team password that members of the team use for all the exported data. This password does not have to be secret within the team.

5.4 Confirm the password.

5.5 Click **Download**. The file is stored in the computer's Downloads folder.

Note: **Download** is disabled until a password is created and confirmed.

5.6 Send the file and the corresponding password via email or USB to the TC.

6. Import File

Purpose: To import the file sent by the surveyor.

Notes:

- Only the TC can import this file.
- The TC receives this file and the corresponding password from the surveyor.
- This process is only available while working offline.

6.1 Click **import** on the **You're Offline Notification Banner** to import any changes, if desired.

6.2 The **Upload and decrypt offline changes** pop-up window opens. See *Figure 14, Upload and Decrypt Offline Changes Pop-Up Window*.

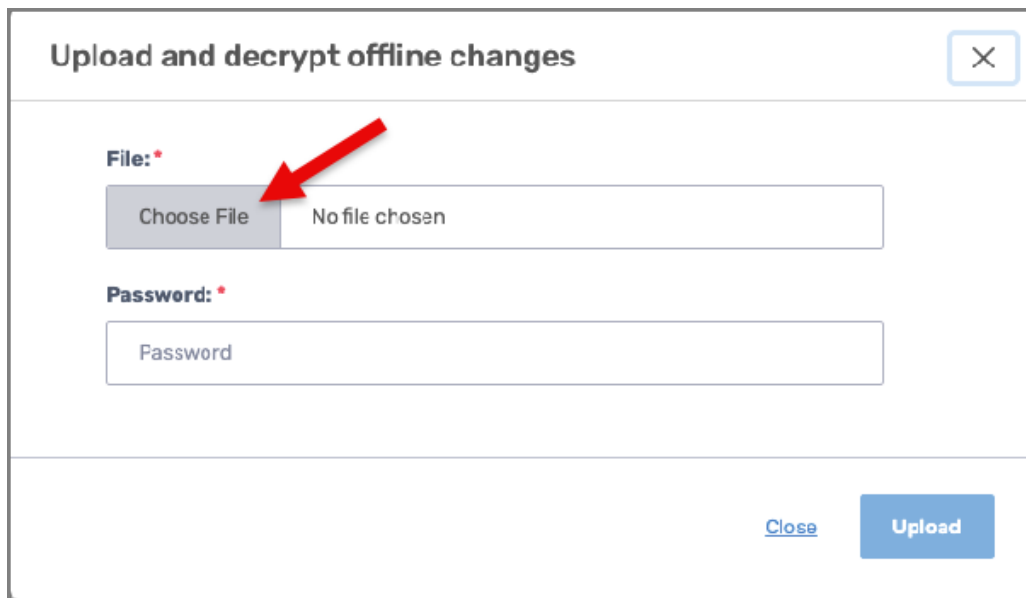


Figure 14: Upload and Decrypt Offline Changes Pop-Up Window

- 6.3 Click **Choose File**. The user's **Downloads** folder opens. See *Figure 15, Example of Downloads Destination*.

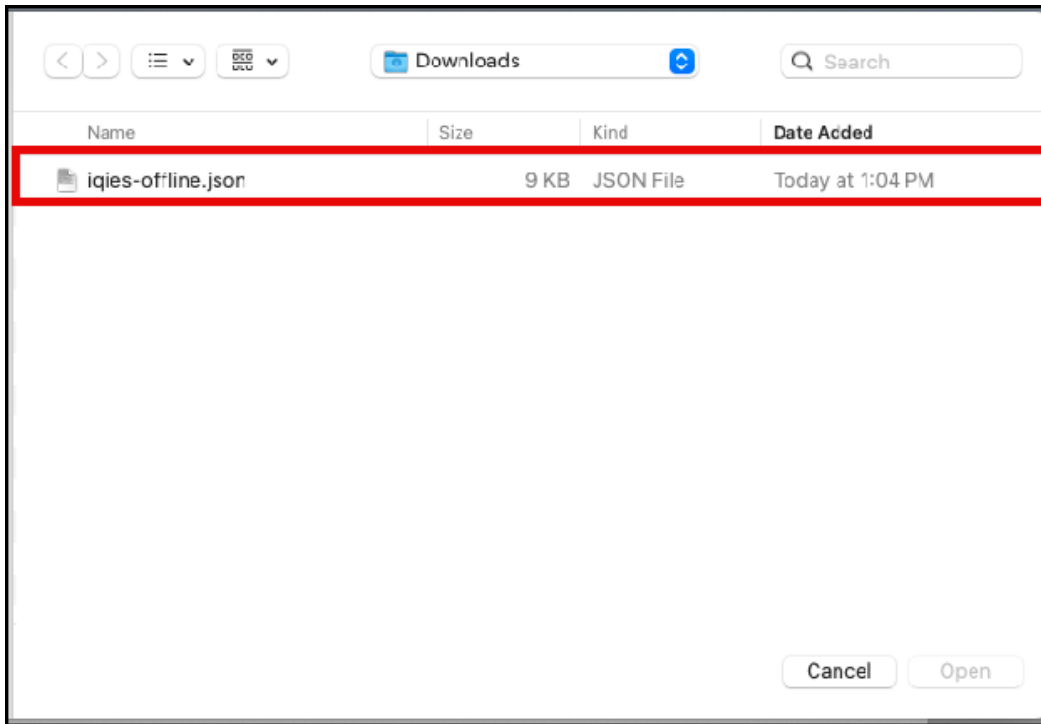


Figure 15: Example of Downloads Destination

- 6.4 Select the file.
- 6.5 Click **Open**.
- 6.6 Type the password associated with the file.
- 6.7 Click **Upload**.
- Note:** **Upload** is disabled until a password is typed.
- 6.8 A blue notification banner appears confirming that the changes have been successfully imported. See *Figure 16, Successful Import Banner*.

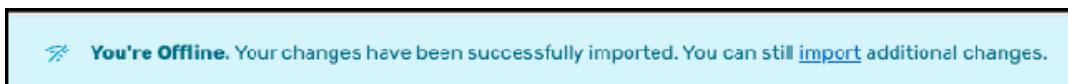


Figure 16: Successful Import Banner

7. Verify File Changes – TC Sync

Purpose: To verify the offline sync occurred.

Note: The TC must be online to sync the changes. When you are able to connect to internet you can confirm the changes that were shared amongst the team were synchronized.

7.1 Reestablish an online connection.

7.2 Verify that the **You're Back Online** blue notification banner appears. The message in the banner updates to **You're Back Online** once the syncing process is complete.

Note: The first blue notification banner shows the process of syncing changes. See *Figure 17, You're Back Online (Syncing Changes) Notification Banner*. The blue notification banner then shows that the changes have been synced. See *Figure 18, You're Back Online (Your Changes Have Been Synced) Notification Banner*.



Figure 17: You're Back Online Banner (Syncing Changes...)

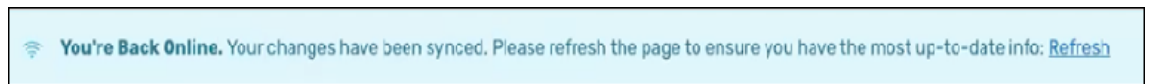


Figure 18: You're Back Online Banner (Your Changes Have Been Synced)