Centers for Medicare & Medicaid Services

Internet Quality Improvement Evaluation System (iQIES)

Survey and Certification: How to Print from iQIES

Job Aid

Version 1.0

8/20/2021

Table of Contents

1.   Introduction

This job aid addresses the steps necessary to print information from iQIES.

Note: All screenshots included in this manual contain only test data. Current screens in iQIES may be different from what is shown in screenshots below.

Note: Screenshots are dependent on user role and may not be an exact representation.

Note: 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, we recommend the latest versions of:
Chrome
Firefox

We also support the latest versions of:
Microsoft Edge
Safari

1.1   Roles and Permissions

iQIES roles allow users to access information pertinent to their area of work. The examples provided in this document pertain to Survey & Certification (S&C) and require a State Agency or Centers for Medicare and Medicaid Services (CMS) role with the capability to view or edit this information.

Permissions are ultimately governed by Health Care Quality Information Systems (HCQIS) Access Roles and Profile (HARP) access privileges. Contact the Security Official (SO) for your organization or the iQIES Service Center for issues relating to access and permissions.

1.2   iQIES Service Center

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

For assistance accessing iQIES: Contact the iQIES SO for your organization

For technical support: Contact the iQIES Service Center:

Phone: 888-477-7876 (select Option 1)
Email: iQIES@cms.hhs.gov

For more information on iQIES: Refer to the QIES Technical Support Office (QTSO) website

iQIES reference materials include:

- Links to Training Videos
- S&C User Manual
- Quick Reference Guides
- Onboarding Guide
- Managing User Information
- Other helpful iQIES material

2.   Print to a .pdf

This section explains how to print or create a .pdf from any screen.

2.1   Locate the Information

2.1.1   Go to **Search**. Click the tab for the desired area: **Providers, Surveys**, **Intakes**, **Enforcements**.

2.1.2   Type search criteria in blank field (box) under **Search for [Providers/Surveys/Intakes/Enforcements]**. *See Figure 1, Search for the Record.*

> **Note**: Click **Show Advanced Search** for a more detailed search, as shown in Figure 1.

2.1.3   Click **Search**.

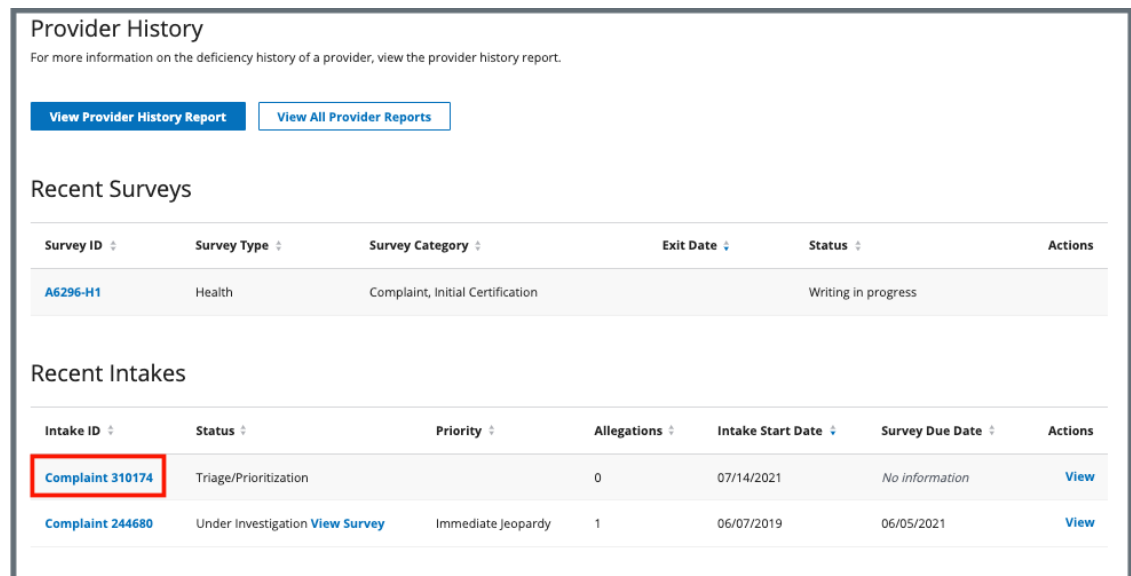**Figure 1: Search for the Record**

2.2   Print to a .pdf

2.2.1   Select the desired record from the left column. For example, select **Complaint 310174**. A summary version of the record opens. *See Figure 2, Select the Record.*

Note: Any record can be selected if the user role has permissions.

Figure 2: Select the Record

2.2.2   Click the vertical ellipsis (hamburger or three dots) at the top right of the screen. A drop-down menu opens.

Note: Browsers look different. Be sure to review the figure for the appropriate browser.

Chrome   *See Figure 3, Chrome Vertical Ellipsis Options Menu*

Firefox   *See Figure 4, Firefox Horizontal Options Menu*

Microsoft Edge *See Figure 5, Edge Horizontal Options Menu*

Safari   *See Figure 6, Safari File Print Menu*

Note: The options menu is a vertical ellipsis in Chrome.
The options menu is three horizontal lines in Firefox and Edge.
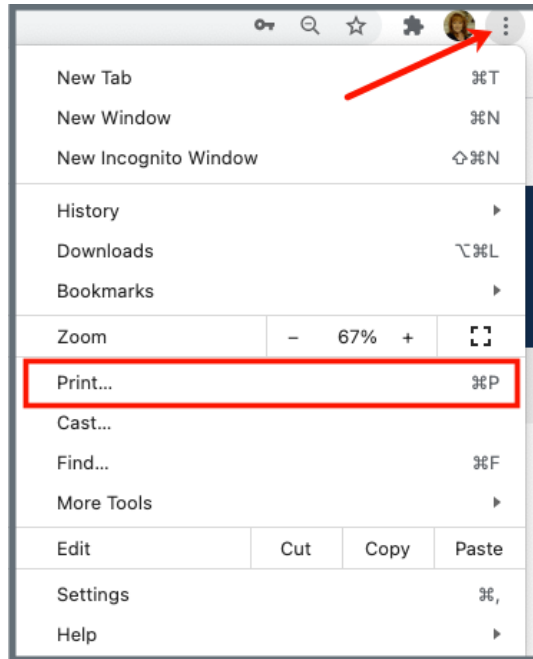The print menu is under **File** in the top menu in Safari.

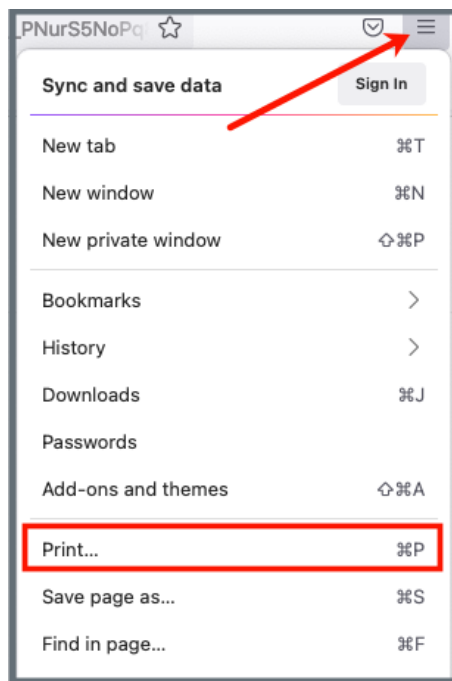**Figure 3: Chrome Vertical Ellipsis Options Menu**

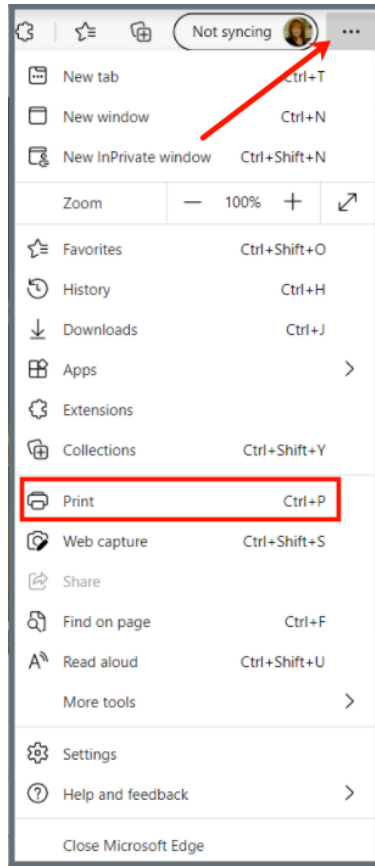**Figure 4: Firefox Horizontal Options Menu**

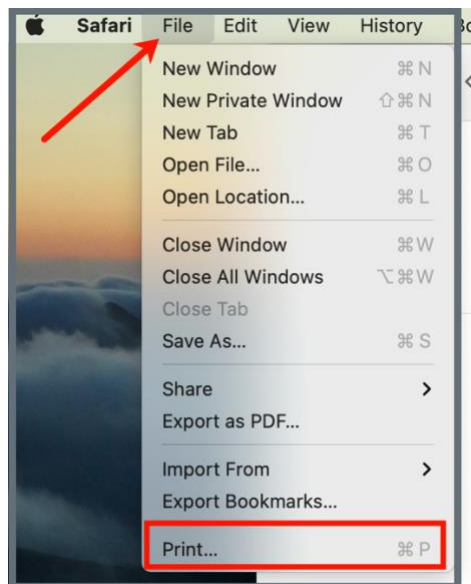**Figure 5: Edge Horizontal Options Menu**

Figure 6: Safari File Print Menu

2.2.3   Select **Print**. The **Print** menu opens.

2.2.4   Select **Save as PDF** from the drop-down menu next to **Destination**.
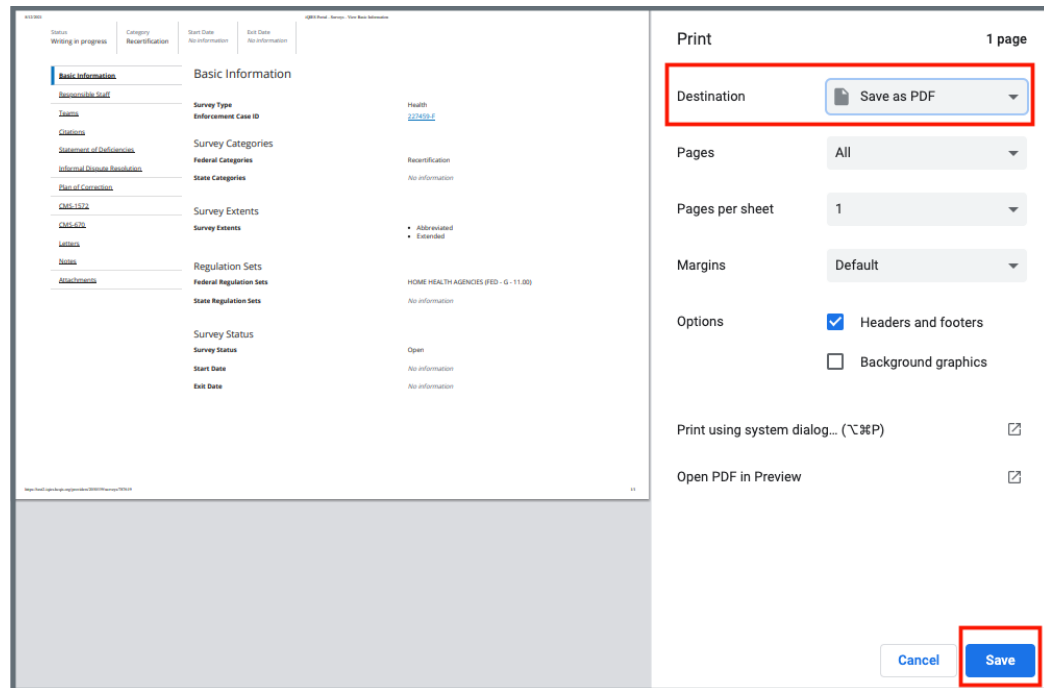*See Figure 7, Print Menu*.

Figure 7: Print Menu

Note: Figure 7 is a Google Chrome print menu. Other print menus may look slightly different.

Note: The drop-down menu next to **Destination** shows all possible choices to print. It is possible to print to a printer as well as a different application recommended by the state (e.g., Adobe PDF Generator), if it is on your computer system.

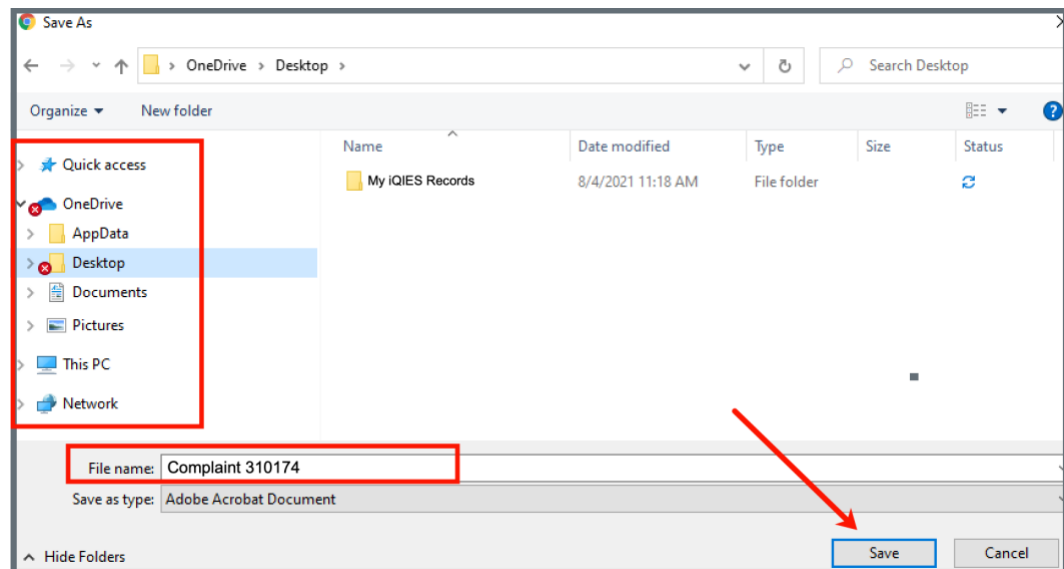2.2.5   Click **Print**. The **Save As** popup window opens. *See Figure 8, Save As Popup Window.*

Figure 8: Save As Popup Window

2.2.6   Select the destination folder on the left.

2.2.7   Type the desired file name next to **File name**.

2.2.8   Click **Save**.

2.2.9   Open the .pdf from the destination folder selected in step 2.2.6.

   Note: In the Adobe PDF application, the file may open in landscape (horizontally). If that is the case, follow these steps:

- Go to **View** on the top menu bar. *See Figure 9, Rotate View*.
- Select **Rotate View** from the drop-down menu. Be sure to click the tiny right arrow next to Rotate View. Another menu opens.
- Click **Rotate Clockwise** or **Rotate Counter-Clockwise**, as desired. Rotate the document until the view is correct.
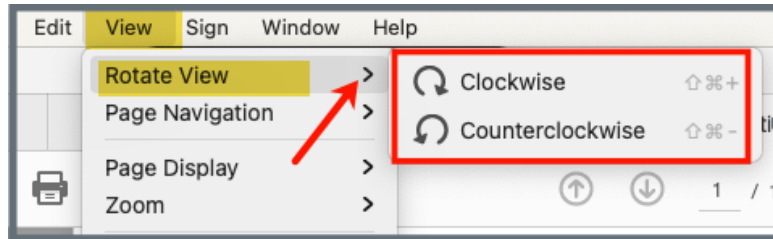- Save the changes

Figure 9: Rotate View