



Centers for Medicare & Medicaid Services

**Internet Quality Improvement & Evaluation
System (iQIES)**

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

**Version 2.2
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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*.

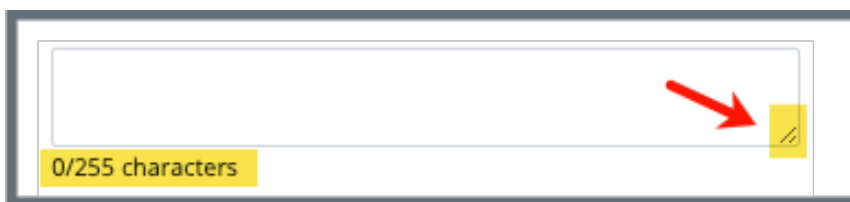


Figure 1: Expandable Field

- iQIES times out after 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 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.

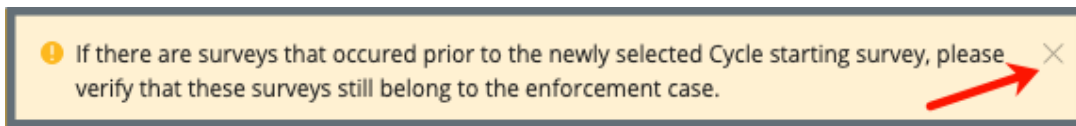


Figure 2: Notification Banner

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*.

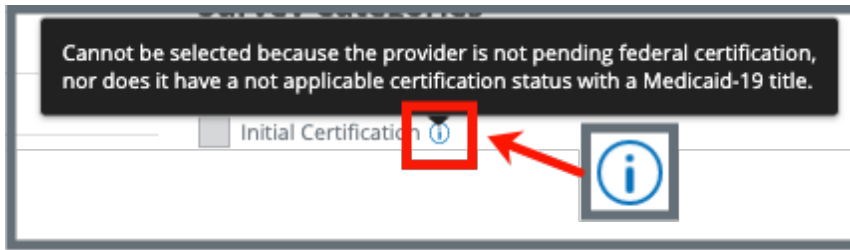


Figure 3: Tool Tip Icon

- 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

iQIES Offline Solution supports work in locations without reliable internet access.

Lost Connection: When an internet connection is lost, a banner indicates that Offline mode is active. Continue work in Offline mode as needed. The system saves all changes.

Available Connection: iQIES detects when a connection becomes available and displays a notification. The application does not switch to Online mode automatically. Control remains with the user. Select the option in the Offline banner to return to Online mode, or continue work in Offline mode.

Check Connection: Use the **Check Connection** option in the Offline banner to confirm connectivity at any time. This option allows a manual transition to Online mode when ready.

Enable Offline: The **Enable Offline** feature aligns with exporting a shell before onsite work. Manual data sharing is not required when a connection is available. All team changes sync in real time after a return to Online mode.

Export/Import: Use **Export** and **Import** functions only in fully remote locations without any connectivity. Treat this process as an exception. Perform Wi-Fi sync whenever possible. In situations without internet access, compile team work and export the data for delivery to the Team Coordinator.

The Team Coordinator imports all exported files and creates a consolidated file for team use. This file contains the complete set of team updates.

Important Note: Both Offline credentials and Offline content remain valid for ten (10) days following the most recent online login. After ten days it is necessary to download Offline content again.

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.

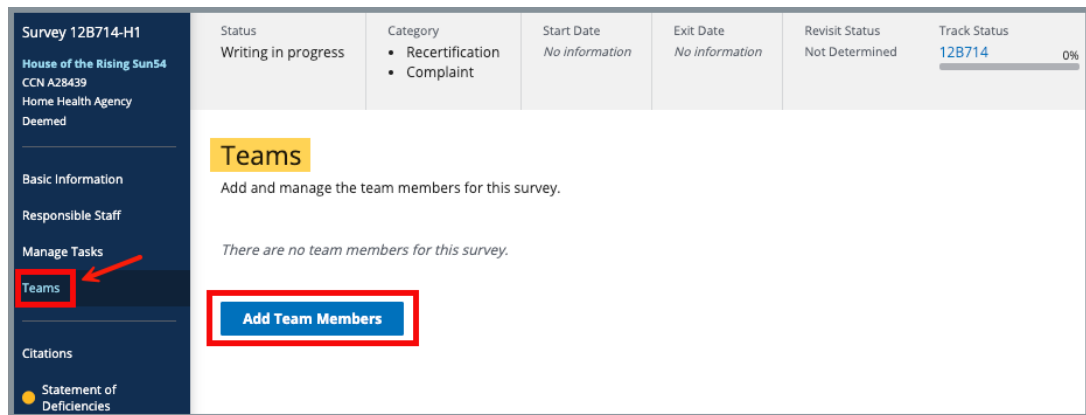


Figure 5: Teams

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

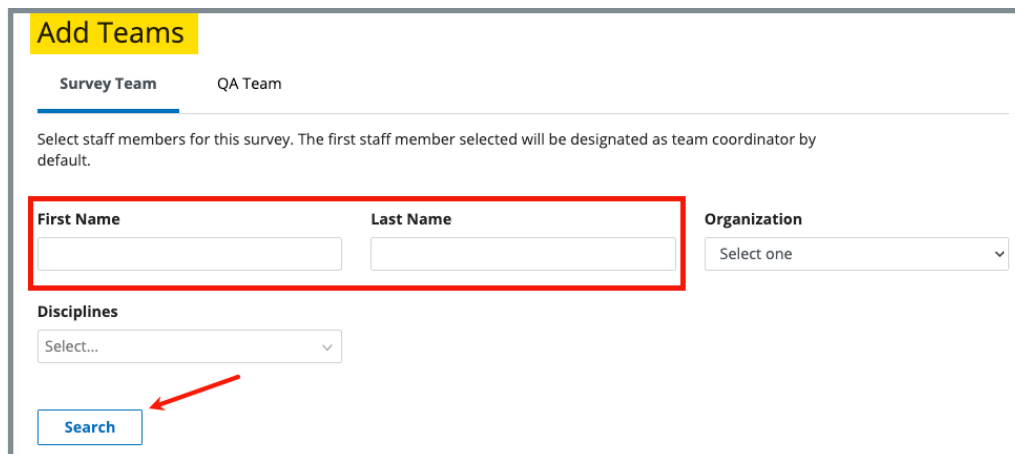


Figure 6: Add Teams

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*.

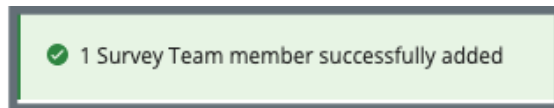


Figure 7: Survey Team Member Successfully Added Popup

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*.

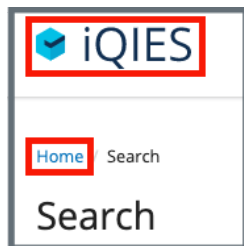


Figure 8: iQIES Logo

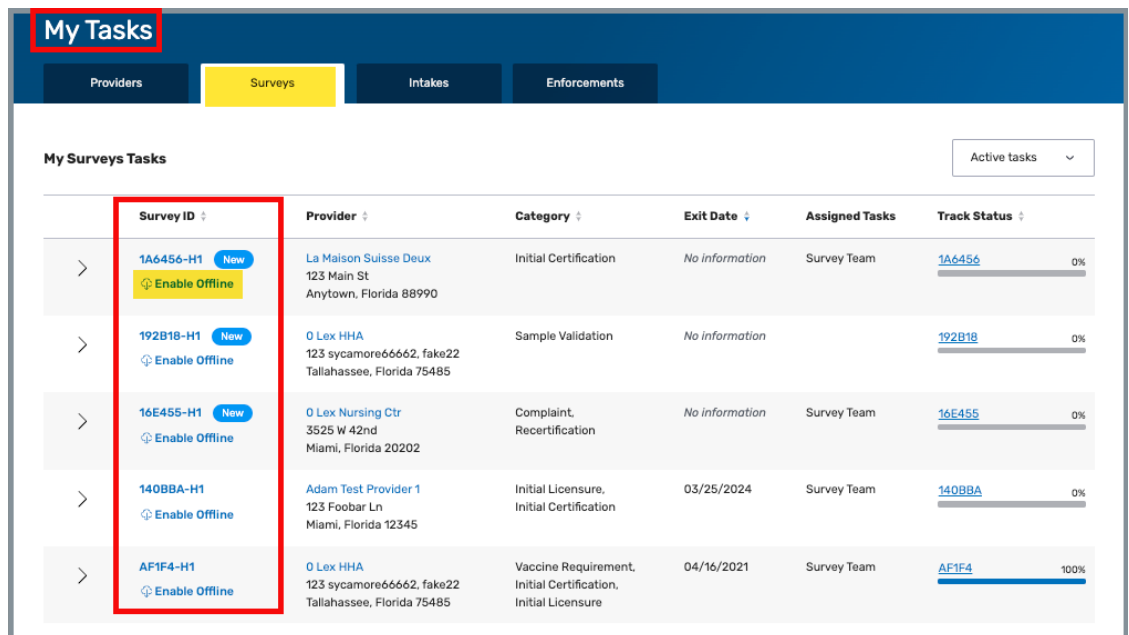


Figure 9: My Tasks Landing Page

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**.

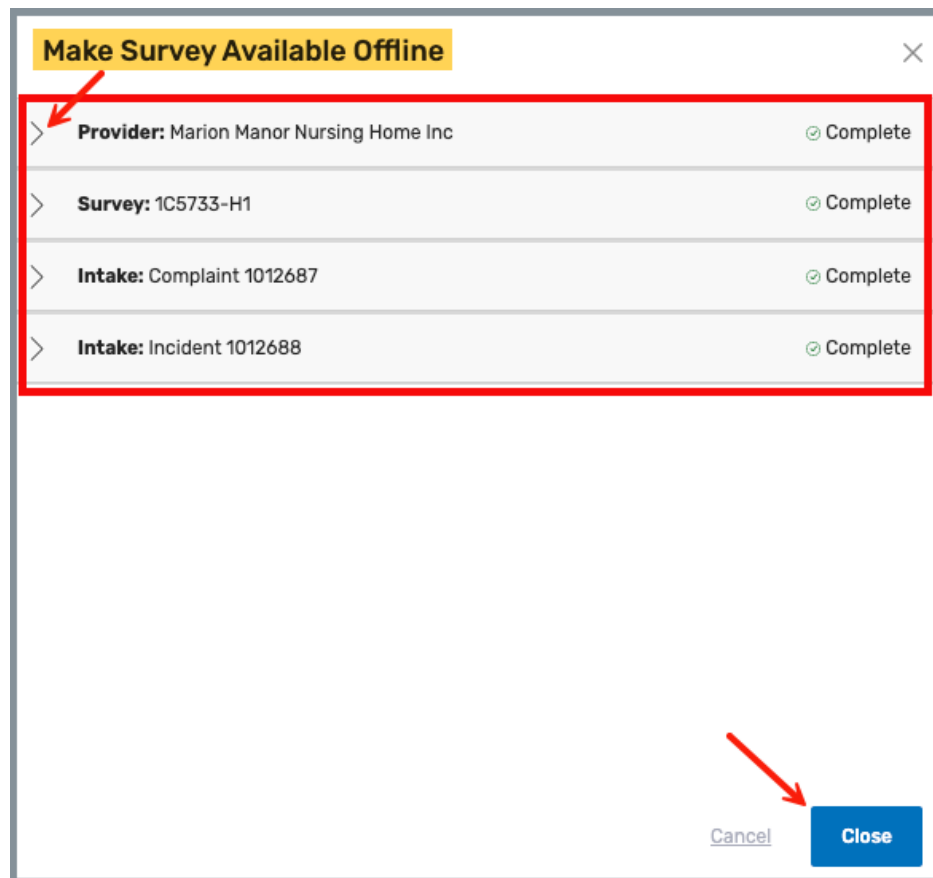


Figure 10: Make Survey Available Offline

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*.

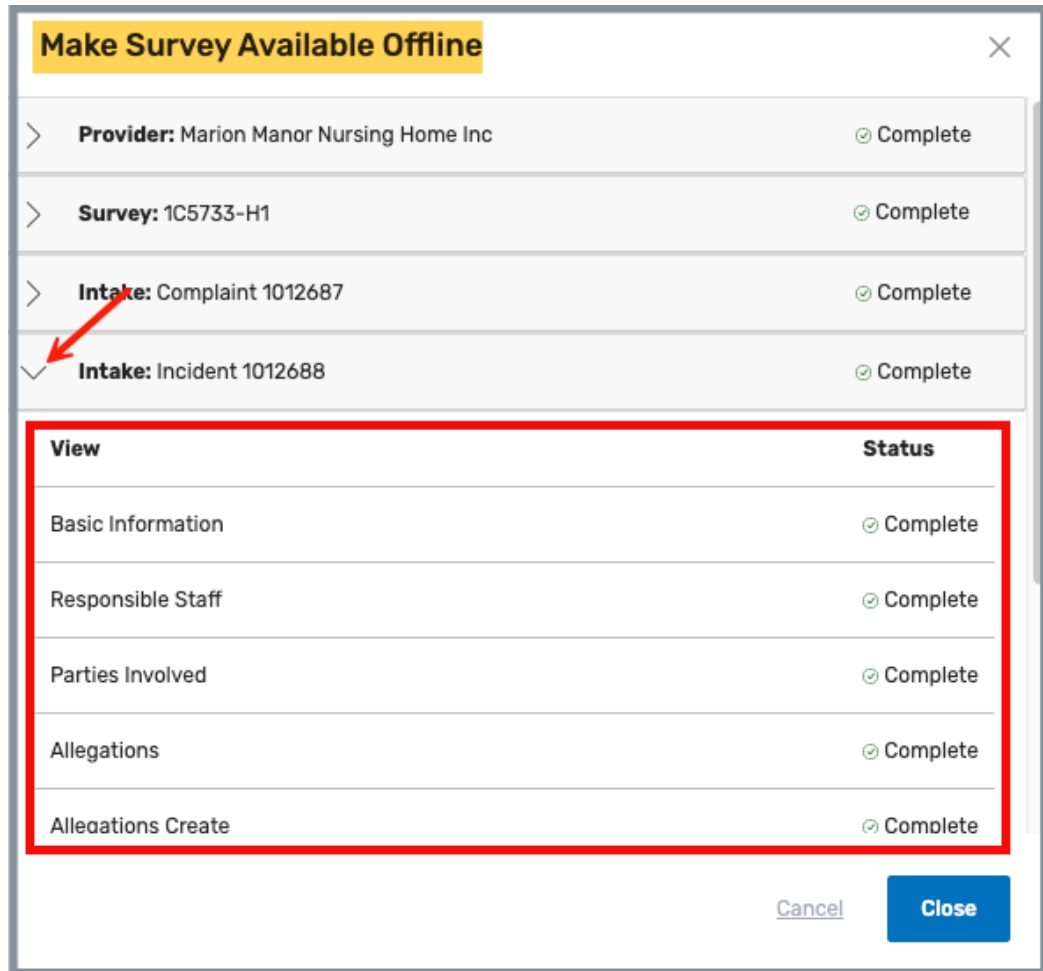


Figure 11: Downloaded Survey Details

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*.

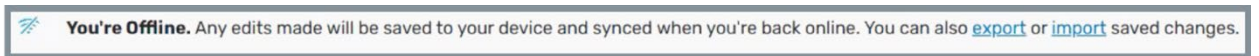


Figure 12: You're Offline Notification Banner

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*.

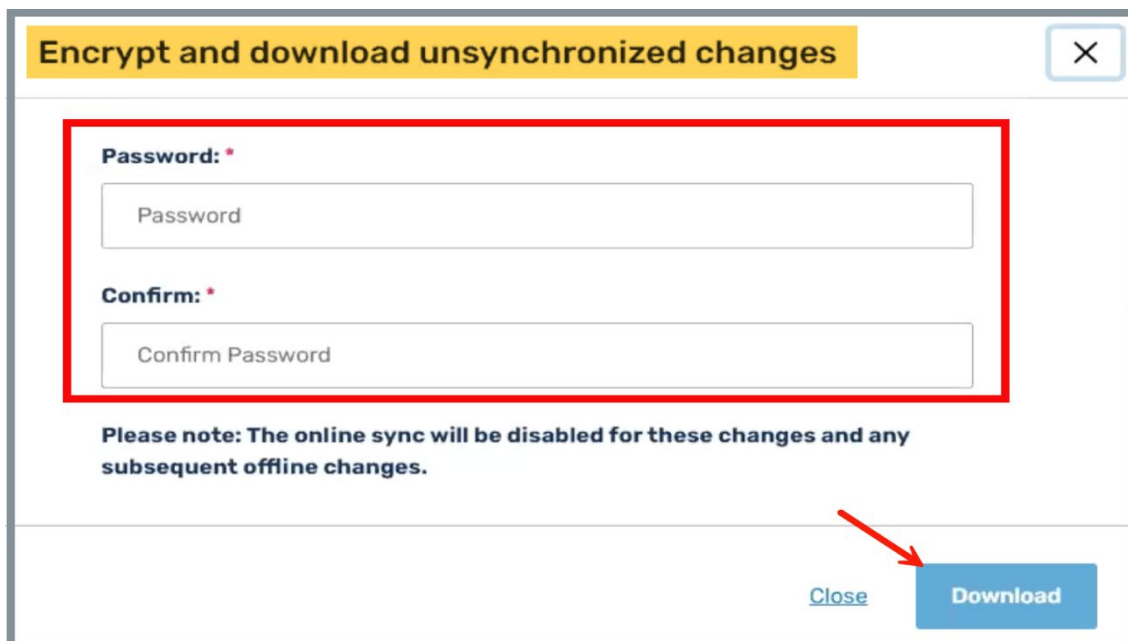


Figure 13: Encrypt and Download Unsynchronized Changes Pop-Up Window

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

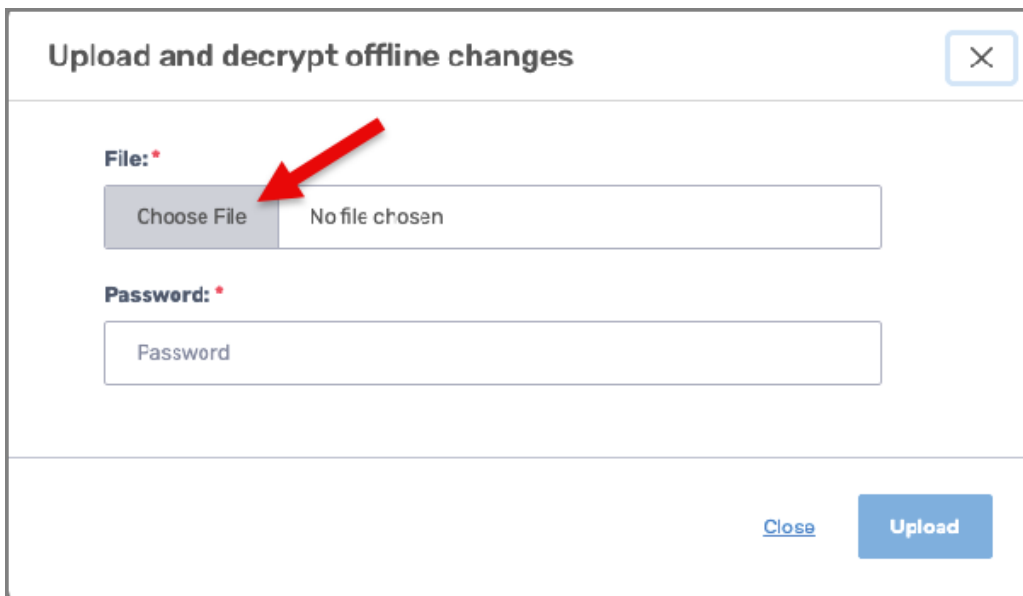
Purpose: To import the file sent by the surveyor.

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*.



The screenshot shows a pop-up window titled "Upload and decrypt offline changes". It features a close button (X) in the top right corner. Below the title bar, there are two input fields. The first is labeled "File: *" and contains a "Choose File" button and the text "No file chosen". A red arrow points to the "Choose File" button. The second input field is labeled "Password: *" and contains the text "Password". At the bottom right of the window, there are two buttons: "Close" and "Upload".

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*.

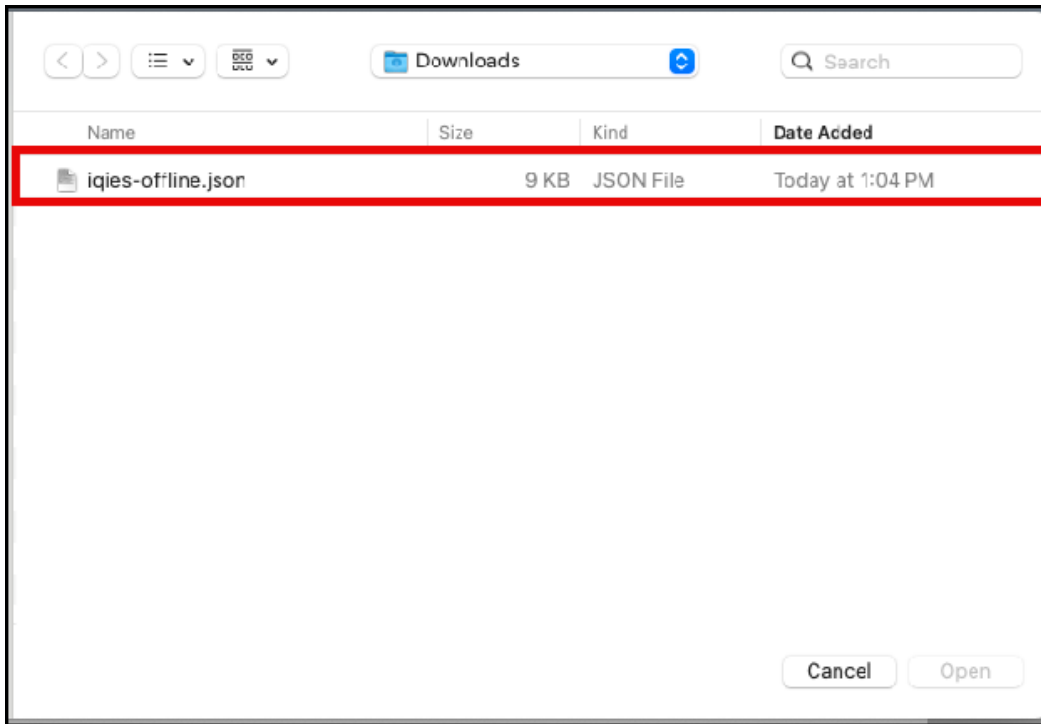


Figure 15: Example of Downloads Destination

- 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*.

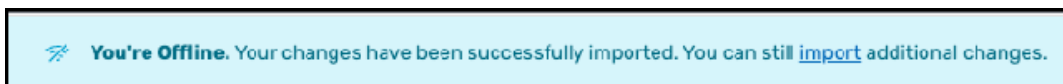


Figure 16: Successful Import Banner

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...)

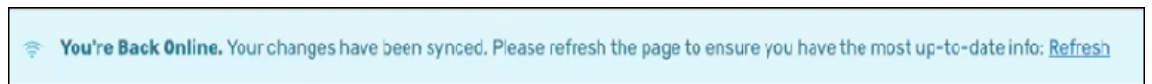


Figure 18: You're Back Online Banner (Your Changes Have Been Synced)