Internet Quality Improvement Evaluation System (iQIES)

Survey & Certification (S&C) Manual

Training Module 1 – Providers - Quick Reference Guide

1. Search for a Provider - Instructions

1. To search for a Provider, click on the Survey & Certification tab at the top of the iQIES Home Page.
2. A drop-down menu will prompt you to '*Search'* for a Provider.
3. On the Search page, you can search by provider name, CCN, FACID, or *'Advanced Search'* to view additional search options.
4. Selecting a provider from '*Search*' will open that provider's *'Provider History'* page.
5. Refer to section 4.1 – Search for Provider in the iQIES S&C manual for more details.

2. Add a Provider – Instructions

1. Select 'Add a Provider' from the drop-down ribbon menu.
2. Required fields are marked with a red asterisk and must be entered before you can save.
3. Enter applicable Provider's information.
4. When complete, select 'Add Provider'. This button will take you to the new provider's profile page, where surveys, intakes and enforcements information can be reviewed or added.
5. Refer to Section 4.1.2 – Add a New Provider in the iQIES S&C manual for more details

3. Provider History - View Recent Surveys, Intakes, & Enforcements - Instructions

1. Recent surveys, intakes and enforcements can all be viewed from the Providers History page.
2. The Provider History Report button is where users can view the provider's citation history.
3. Once a provider is selected, surveys, intakes and enforcements can be added by selecting the 'Add ___' button under each corresponding section.
4. Once a module is populated the 'blue' links will direct you to the respective iQIES page.
5. Once a module is populated the 'View Details' buttons on the Provider History page will open the Basic Information page. See item 4 below for more information about that page.
6. Refer to the individual module sections in the iQIES S&C manual for more details about adding and viewing surveys, intakes, and enforcements.

4. Basic Information Page - Instructions

NOTE: Selecting the 'View Details' will also open up the Basic Information page.
1. The 'Basic Information' page contains an overview of the provider's information including name, provider type, primary location address, and other data.
2. Select Edit to modify the information.
3. Select 'Return to Provider' to get back to Provider History page.
Refer to Section 4.1.1.5 - Provider - Basic Information Page in the iQIES S&C manual for more details.

5. View Provider History Reports, Save or Downloading My Reports – Instructions

1. You can select the 'Save to My Reports' button to save your report to a specific folder, or you can download to a PDF file format.
2. You can select 'Expand All' or 'Collapse All' for more viewing options.
3. You must provide a Report Name and select the folder where you want to save the file.
4. Select 'Save' before leaving the Report Name page, or 'Cancel' to exit.
5. Refer to Section 4.1.1.6.2 – Download Reports in the iQIES S&C manual for more details.

6. Certification and Licensure - Instructions

NOTE: From the Provider Details page you can access the Certification and Licensure section to add or edit the selected provider's certification and licensure status and related information.

1. From the Certification and Licensure page select the 'Edit' button to revise or review Federal Certification Status.
2. To create an initial certification, first verify that the provider's 'Federal Certification Status' is set to 'Pending Certification'.
3. Next create the initial certification survey, enter findings, and add information to the CMS-670 and CMS-1572 form sections.
4. Ensure all citations show a status of 'Writing Complete' and lock the citations. Then notify your CMS Location representative that the certification is complete.
5. As a CMS user, go to the '*Certification and Licensure'* section of the provider and select 'Edit'.
6. The CCN will be generated by the system.
7. Update the Federal Certification Status to 'Certified', add the dates for Certification and Original Participation, and select 'Save'.
8. Refer to Section 4.1.2.2.5 - Certification and Licensure in the iQIES S&C manual for more details.

7. Supplemental Information - Instructions

1. Supplemental documents, including letters, notes, and attachments, can be added to providers surveys, complaints, intakes, and enforcements by selecting the appropriate side bar.
2. There are also options for adding information about: Mailing Address, Additional Branch Addresses, Operating Details, Additional Contacts, Deeming Information and Administrator.
3. Upon selecting the desired section, you will be taken to a page to add the supplemental information.
4. Refer to Section 4.1.4.5 – Letters, and Section 4.1.4.6 – Attachments in the iQIES S&C manual for more details

8. Help and Support Information

Available Help Resources:

View Resources	Get Help	Stay Connected
QIES Technical Support Office	By Phone: (800) 339-9313	
Known Issues	By Email: iQIES@cms.hhs.gov	
Validation Utility Tool		Sign up for the iQIES Newsletter
System Requirements		Enter your email **Subscribe**
Medicare		
Help		

Privacy Policy   Plain Writing   Freedom of Information Act   No Fear Act   Download Adobe Reader

iQIES

A federal government website managed and paid for by the U.S. Centers for Medicare & Medicaid Services. 7500 Security Boulevard, Baltimore, MD 21244