

Internet Quality Improvement Evaluation System (iQIES)

Survey & Certification (S&C) Manual



Training Module 3 – Intakes - Quick Reference Guide

1. View Recent Intakes - Instructions

1. To view a recent intake, click on the 'Survey and Certification' tab at the top of the iQIES Home Page, then select 'Search'.
2. On the 'Search' page, click the 'Intakes' tab and then select a provider under the 'Provider' column.
3. From the 'Provider History' page, select any of the intakes listed under the 'Intake ID' column to view recent intakes.
4. A provider's three most recent intakes will be displayed under the 'Recent Intakes' heading.
5. The 'View All Intakes' button will be enabled when the provider has three or more intakes.
6. Refer to section 6.1.1 – Recent Intakes in the iQIES S&C manual for more details.

2. Add a New Intake – Instructions

1. To add a new intake, select the 'Add Intake' button from the Provider History page. You will be taken to the intake's Basic Information page.
2. You must select the 'Intake Type', Complaint or Incident, after you have collected the information needed to assign the Subtype.
3. The new intake form will auto populate the 'Intake Start Date and Start Time'.
4. The new intake is assigned an intake ID when the 'Save Section' is selected.
5. Refer to Section 6.1.2 – Add a New Intake in the iQIES S&C manual for more details.

3. Intake Basic Information Page - Instructions

NOTE: Selecting any of the intakes listed under the Intake ID toggle will open the Basic Information page for that intake.

1. The 'Basic Information' page contains an overview of the complainant or incident details taken during the intake, including intake type, method, start date / time, tracking ID, sources, a summary of the complaint for the intake, and the subtype.
2. From the new intake 'Basic Information' page, the user can access additional sections, such as: responsible staff, parties involved, allegations, triage, survey (if applicable), letters, notes, and attachments. Select any section to add new information or edit existing.
3. Select the provider's information in the heading (in blue) to return to Provider History page.
4. Refer to Section 6.1.2.1 – Intakes - Basic Information Page in the iQIES S&C manual for more details.

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4. Link an Intake to a Survey - Instructions

1. An intake can be connected to a survey in three ways as follows:
 - a. Add a survey on the provider's profile page - Connect the survey to your intake by selecting the intake in the list under Open Intakes to include a complaint survey.
 - b. Link to a survey in the intake's Survey section - Navigate to the intake you are working on. In the Survey section, the provider's open surveys will be listed. Select the 'survey ID' to view the survey. Select Edit to link the survey to the intake.
 - c. Add a survey in the intake's Survey section - Navigate to the intake you are working on. In the Survey section, select 'Create Survey'. The survey category will default to a complaint survey for the intake. Select 'Save' once survey is linked.
2. Refer to Section 6.1.2.9.3 – Link an Intake to a Survey in the iQIES S&C manual for more details.

5. Supplemental Information - Instruction

1. Refer to Section 6.1.2.7 – Letters, Section 6.1.2.8 – Notes, and Section 6.1.2.9 – Attachments in the iQIES S&C manual for more details.

6. Help and Support Information

Available Help Resources:

View Resources

QIES Technical Support Office

Known Issues

Validation Utility Tool

System Requirements

Medicare

Help

Get Help

By Phone: (800) 339-9313

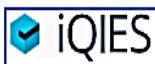
By Email: iQIES@cms.hhs.gov

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