



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

**iQIES Announcement and Notification System
(iQAN)**

Version 1.1

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1. Introduction

This user manual addresses the processes necessary to perform iQAN functions in iQIES.

1.1 Getting Started – 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 the [iQIES Onboarding Guide](#) for further information, if necessary.
- All screenshots included in this manual contain only test data. Current screens in iQIES may differ from what is shown in screenshots below.
- 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*.

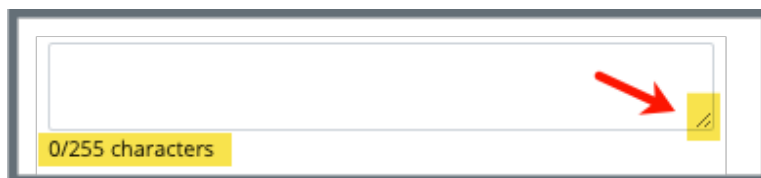


Figure 1: Expandable Field

- 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 the 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.

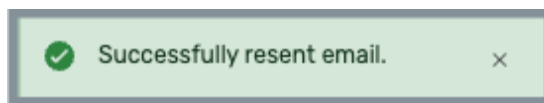


Figure 2: Notification Banner

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 information icon to see the tip. Tool Tips are in iQIES to communicate information. Look for the information icon. See *Figure 3, Tool Tip Icon*.

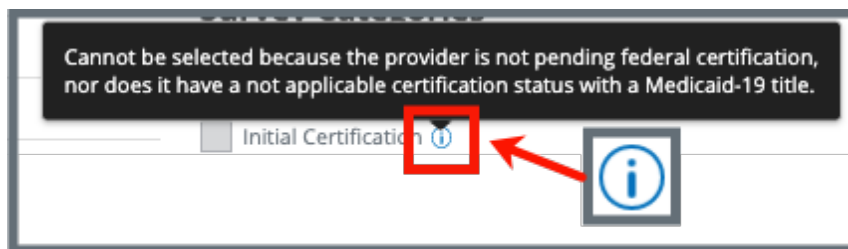


Figure 3: Tool Tip Icon

- 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 in iQIES.

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

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

2. iQAN Overview

iQAN is a content delivery service in iQIES.

This manual explains how to create and send an email.

3. iQAN User Roles

There are four general CMS iQAN user roles:

- **iQAN CLIA User**
- **iQAN CLIA Admin**
- **State Agency – iQAN CLIA User**
- **iQAN Admin**

and three State Agency iQAN user roles:

- **State Agency iQAN CLIA User**
- **State Agency General User**
- **State Agency iQAN NH User.**

User roles are based on provider type. The **iQAN Admin user role** is for all provider types.

Please contact iQIES@cms.hhs.gov with the subject **iQAN New User Roles**, to request additional provider user roles.

iQAN CLIA User: Authorized CLIA user.
Access iQAN bulk messaging functionality.

iQAN CLIA Admin: Authorized CLIA administrators.
Access and manage iQAN bulk messaging functionality and reporting.

State Agency – iQAN CLIA User:
Limited email privileges.

iQAN Admin: Authorized iQAN administrators.
Access and manage all iQAN functionality for all provider types.

4. Request a CMS iQAN role

- 4.1 Log into iQIES.
- 4.2 Click the caret next to the user name in the top right menu.
- 4.3 Click **Request User Role** from the drop-down menu under user name. See *Figure 4, Request User Role*. The **Select a User Category** window opens.

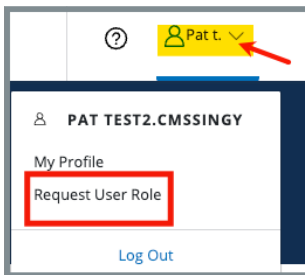


Figure 4: Request User Role

- 4.4 Select **CMS**. See *Figure 5, Select a User Category*.

A screenshot of the 'STEP 1 Select a User Category' window. The title 'STEP 1' is at the top left, and 'Select a User Category' is in a yellow box. Below the title, it says 'Select the category of your organization to begin the role request process.' There is a list of categories, each with a radio button. The 'CMS' category is selected, indicated by a blue dot and a red rectangular box around it. The 'CMS' category description is 'iQIES Administration for User Security Support for Patient Assessments and or Survey and Certification.' Other categories include 'Accrediting Organization', 'ADO', 'Contractor', 'Provider', 'QIO/QIN', 'State Agency', and 'Vendor'. At the bottom, there are 'Next' and 'Cancel' buttons. A red arrow points to the 'Next' button.

Figure 5: Select a User Category

- 4.5 Click **Next**. The **Select a User Role** window opens. See *Figure 6, Select a User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- ☐ **CMS View Only User**
View patient profiles, view assessments, generate and view reports.
- ☐ **CMS General User**
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.
- ☐ **iQIES Help Desk**
iQIES system support.
- ☐ **iQIES Help Desk Production Control**
Approve, Reject, and Remove User Requests; Manage ICD-10 exclusions and patient assessment information, view patient profile and assessments, manage patient assessments, run provider reports.
- ☐ **CMS Security Official**
iQIES user account approvals.
- ☐ **Office of Financial Management User**
Track CMPTS cases; record CMPTS payments
- ☐ **iQAN Admin**
For authorized iQAN administrators, access and manage all iQAN functionality per provider type.
- ☐ **iQAN CLIA Admin**
For authorized CLIA administrators, access and manage iQAN bulk messaging functionality and reporting.
- ☒ **iQAN CLIA User**
For authorized CLIA personnel, access iQAN bulk messaging functionality.
- ☐ **CLIA Admin**
Authorized CLIA administrators can access the CLIA admin portal and accounting functionality.

Next Previous

Figure 6: Select a User Role

- 4.6 Select **iQAN CLIA User**.
- 4.7 Click **Next**. The **Add Organizations** window opens. See *Figure 7, Add Organizations*.

STEP 3

Add Organizations

This role does not require the addition of organizations.

Submit Request Previous

Figure 7: Add Organizations

4.8 Click **Submit Request**.

4.9 Verify the **Role Request Submitted** green notification bar appears on the top of the page. See *Figure 8, Role Request Submitted Green Notification Bar and Pending Requests*.

Notes:

- The pending request appears under **Pending Requests** at the bottom of the screen.
- The role must be approved by the SO. Approval can take up to several days. For more information on user roles, refer to the [iQIES User Roles Matrix](#).
- Once the role is approved, the **iQAN** selection will be in the drop-down list under **Administration** on the top menu. See [iQAN Dashboard](#).

The screenshot displays the iQAN user interface. At the top, a green notification bar with a checkmark icon and the text "Role Request Submitted" is visible, with a sub-message: "Your approval status will be emailed to you after your request is reviewed." Below this, the "User Information" section includes fields for User ID, Email, Phone Number, and Federal Surveyor ID, along with an "Edit in HARP" link. A yellow "Pending Requests" header is followed by a "Request User Role" button. Below this, a table lists pending requests under the heading "CMS". The first row of the table is highlighted with a red box, showing the "User Role" as "iQAN CLIA User".

User Role	Security Official Name	Security Official Contact	Request Date
iQAN CLIA User	Pat test2.cmsso.bthompson	test2.cmsso.bthompson@fake....	06/26/2023
	Pat test2.cmsgu.bthompson	test2.cmsgu.bthompson@fake....	
	Pat test2.CMSSO.user2	test2.cmsso.user2@fake.org	
	Pat so	so@fake.org	

Figure 8: Role Request Submitted Green Notification Bar and Pending Requests

5. Request a State Agency iQAN role

- 5.1 Log into iQIES.
- 5.2 Click the caret next to the user name in the top right menu.
- 5.3 Click **Request User Role** from the drop-down menu under user name. See *Figure 9, Request User Role*. The **Select a User Category** window opens.

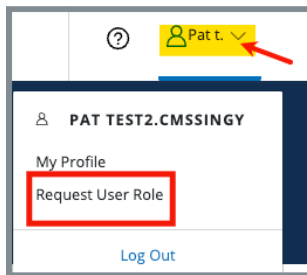


Figure 9: Request User Role

- 5.4 Select **State Agency**. See *Figure 10, Select a User Category*.

A screenshot of the 'Select a User Category' window. The window has a title bar that says 'STEP 1' and 'Select a User Category'. Below the title bar, there is a text prompt: 'Select the category of your organization to begin the role request process.' There are seven radio button options listed: 'Accrediting Organization' (Administration and survey of deemed healthcare providers.), 'CMS' (iQIES Administration for User Security Support for Patient Assessments and or Survey and Certification.), 'Contractor' (CMS Contractors, Contract Surveyors, Medicare Administrative Contractors, Medicare Administrative Contractor Security Official), 'Federal Agency' (Federal Agency roles), 'Provider' (Healthcare organizations, agencies, and services.), 'QIO/QIN' (QIO/QIN-level administration for provider Quality Measure support activities), and 'State Agency' (State-level administration for Survey and Certification activities and Patient Assessments Management activities.). The 'State Agency' option is selected and highlighted with a red rectangle. At the bottom of the window, there are two buttons: 'Next' (highlighted with a red arrow) and 'Cancel'.

Figure 10: Select a User Category

- 5.5 Click **Next**. The **Select a User Role** window opens. See *Figure 11, Select a User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- ☐ **State Agency Assessment Coordinator**
Manage ICD-10 exclusions and patient assessment information, view and manage patient profiles and assessments, run provider reports.
- ☐ **State Agency Security Official for S&C**
iQIES user access approvals and user profiles.
- ☐ **State Agency S&C General User**
This role will have the most basic access to iQIES, which would be Read Only access to the provider information. This role will be granted extra authority based on your job requirements by the State Agency Security Official.
- ☐ **MDS Extract Data API Access**
Access MDS Extract Data API
- ☒ **State Agency - iQAN CLIA User**
Allow state agency users access to the iQAN email notification system within iQIES
- ☐ **State Agency - CLIA Billing User**
Allow state agency users access to the CLIA Accounting system
- ☐ **State Agency iQAN NH User**
Allow state agency users access to the iQAN email notification system for Nursing Home within iQIES
- ☐ **State Agency iQAN ACC User**
Allow state agency users access to the iQAN email notification system for all acute & continuing care provider types within iQIES

[Next](#) [Previous](#)

Figure 11: Select a User Role

5.6 Select a **State Agency** user role.

5.7 Click **Next**. The **Add Organizations** window opens. See *Figure 12, Add Organizations*.

STEP 3

Add Organizations

Enter the state for your organization.

State *

Select one

State Agency Employee ID

Forgot your ID? [?](#)

Submit Request [Previous](#)

Figure 12: Add Organizations

5.8 Select state from drop-down menu under **State**.

5.9 Click **Submit Request**.

Note: **Submit Request** is disabled until a state is selected.

5.10 Verify the **Role Request Submitted** green notification bar appears on the top of the page. See *Figure 13, Role Request Submitted Green Notification Bar and Pending Requests*.

Notes:

- The pending request appears under **Pending Requests** at the bottom of the screen.
- The role must be approved by the SO. Approval can take up to several days. For more information on user roles, refer to the [iQIES User Roles Matrix](#).
- Once the role is approved, the **iQAN** selection will be in the drop-down list under **Administration** on the top menu. See [iQAN Dashboard](#).

Welcome to iQIES

✔

Role Request Submitted
Your approval status will be emailed to you after your request is reviewed.

iQIES is the Internet Quality Improvement and Evaluation System and home to everything you need to manage provider and patient information and ensure quality healthcare for the most vulnerable patients.

Request User Role

Pending Requests

State Agency

User Role State Agency - iQAN CLIA User	State Agency Colorado	Management Unit No information	Work Unit No information
Security Official Name [Redacted]	Security Official Contact [Redacted]	Request Date 11/14/2025	

Figure 13: Role Request Submitted Green Notification Bar and Pending Requests

6. iQAN Dashboard

6.1 Dashboard Landing Page

Click **iQAN** under **Administration** on the top menu. See *Figure 14, iQAN Administration*. The iQAN dashboard opens. See *Figure 15, iQAN Dashboard*.

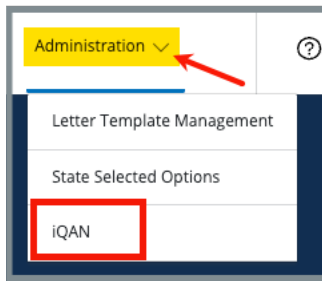


Figure 14: iQAN Administration

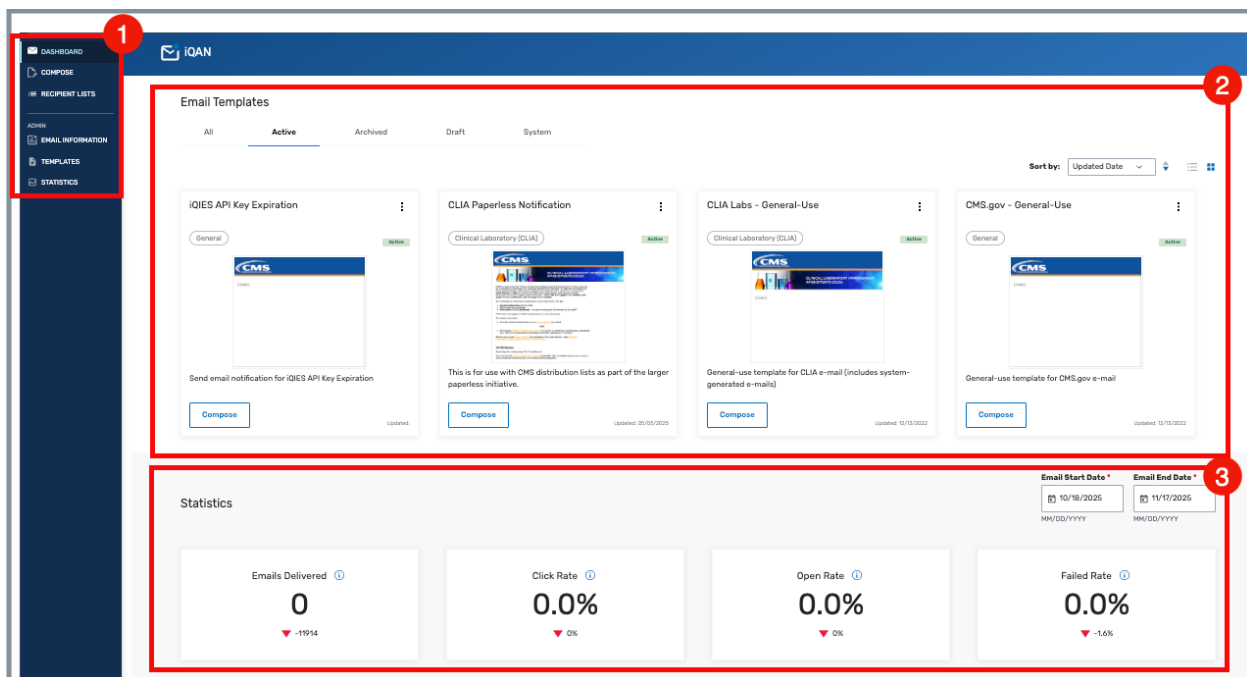


Figure 15: iQAN Dashboard

Note: See [Detailed Dashboard Information](#) for detailed information on each of the three callouts on this figure.

6.2 Detailed Dashboard Information

Note: The complete dashboard figure is located in the [Dashboard Landing page step](#). The following are callout details from that figure.

6.2.1 Left Menu Callout 1

Note: See *Figure 16, iQAN Dashboard Left Menu Callout 1* and *Table 2, iQAN Dashboard Left Menu Callout 1 Details*.

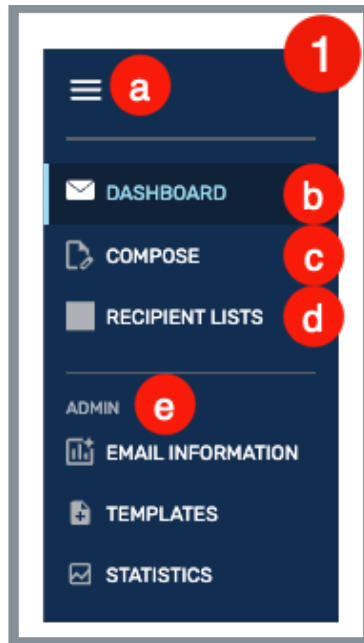


Figure 16: iQAN Dashboard Left Menu Callout 1

Table 2: iQAN Dashboard Left Menu Callout 1 Details

Callout	Detailed Explanation
a	Horizontal ellipsis (hamburger). Opens and shuts the left menu.
b	Click DASHBOARD to open the iQAN dashboard. This is the default view.
c	Click COMPOSE to compose an email.
d	Click RECIPIENT LISTS to see the recipient list.

e	<p>Click EMAIL INFORMATION to review sent emails.</p> <p>Click TEMPLATES to create, update or edit a template.</p> <p>Click STATISTICS to view the statistics. Statistics are shown as a default on the dashboard</p> <p>Note: These actions are only available to Admin users and are not shown on the general user role.</p>
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6.2.2 Email Templates Callout 2

Notes:

- Only the **Admin** user role can create a template.
- All templates must be approved by CMS before use. Template approvals are not part of iQAN.
- A template must be published before it is available for use.
- System templates cannot be modified. System templates are created in collaboration with the iQAN team for use in automation workflows.
- See *Figure 17, iQAN Dashboard Email Templates Callout 2* and *Table 3, iQAN Dashboard Email Templates Callout 2 Details*.

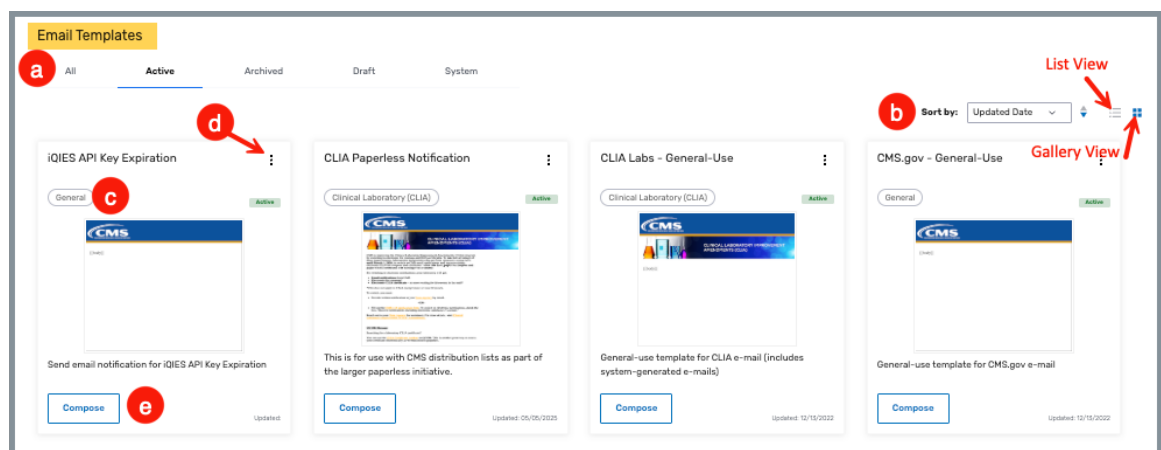


Figure 17: iQAN Dashboard Email Templates Callout 2

Table 3: iQAN Dashboard Email Templates Callout 2 Details

Callout	Detailed Explanation
a	<p>Note: Only Admin user roles can view all five tabs. All other user roles see only the Active tab.</p> <p>The Active tab shows existing templates for use.</p> <p>The iQAN Admin user role can view Archived, Draft, and System templates.</p>
b	<p>The templates can be sorted by Template ID, Display Name, Provider Type, Updated Date, and Status.</p> <p>Click the right icon to view the templates as a gallery. This is the default view.</p> <p>Click the left list icon to view the templates in a detailed list.</p> <p>The blue highlighted view icon is the icon in use. iQAN defaults to the gallery view.</p>
c	<p>Each template has one provider type tagged.</p> <ul style="list-style-type: none"> • The template is available for that provider type only. • The provider type is General when the template needs to be made available for more than one provider type. • A General tag allows all users to use that template.
d	Click the Actions menu (vertical ellipsis) to select Preview , Edit , Duplicate , or Archive an email.
e	Click Compose to start a new email using that template.

6.2.3 Statistics Callout 3

Statistics are system-wide statistics for the selected time period. See *Figure 18, iQAN Dashboard Statistics Callout 3* and *Table 4, iQAN Statistics Callout 3 Details*.

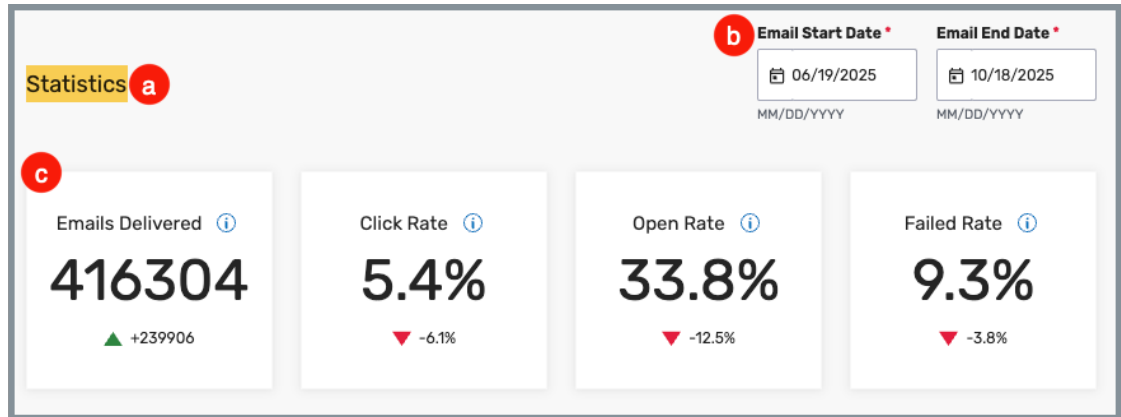


Figure 18: iQAN Dashboard Statistics Callout 3

Table 4: iQAN Dashboard Statistics Callout 3 Details

Callout	Detailed Explanation
a	<p>Delivery Statistics show detailed information on:</p> <ul style="list-style-type: none"> Percentage of emails delivered to the recipient Percentage of emails whose attached links were selected Percentage of emails opened by a recipient Percentage of emails that were not delivered <p>The triangles below the number/percentage shows the trending percentage up (green triangle) or down (red triangle).</p>
b	<p>Type the start/end date to view detailed statistics for a specific time period.</p> <p>Note: The search is limited to a one-year time period.</p>
c	Shows requested statistics

7. Compose an Email

Purpose: To create an email to send to a recipient list

Note: Templates are provider specific. The provider can only see provider-specific templates. General templates are available to all users.

- 7.1 Click **COMPOSE** on the left menu. See *Figure 19, Compose*. The **Compose/Email Details** window opens.

Note: Click **Select** on any template to compose an email directly from the dashboard. The **Compose** window opens with the **Email Template** filled in.

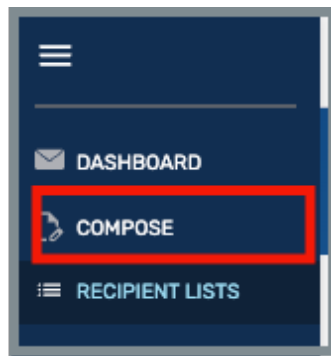


Figure 19: Compose/Email Details

- 7.2 Fill out the information under **Email Details** tab. See *Figure 20, Email Details Callouts* and *Table 5, Email Details, Detailed Callout*.

Note: Select **Email Template** first. Email addresses are removed when the template is selected after email addresses are added.

The screenshot shows the 'Compose' email interface. At the top, there is a 'Compose' button and 'Cancel' and 'Send Email' buttons. Below this, there are two tabs: 'Email Details' (callout 1) and 'Email Content' (callout 2). Under the 'Email Details' tab, there is a section for 'Email Template' (callout 3) with a dropdown menu. Below this is a section for 'Email Recipients' (callout 4) with a 'Select List Name' dropdown menu and an 'Add' button. Below that is an 'Email Address' field with a '+' button. At the bottom left is an 'Items Added' list (callout 5). On the right side, there is an 'Email Preview' section (callout 6) showing a subject line preview and a large area for the email body. A message 'No Template Selected' (callout 7) is displayed in the preview area.

Figure 20: Email Details Callouts

Table 5: Email Details Detailed Callout

Callout	Detailed Explanation
1	Email Details: Select this tab for email template header and recipient information.
2	Email Content: Select this tab for email subject and content information.
3	<p>Email Template: Select an existing template from the drop-down list.</p> <p>Note: The template name shows directly under Email Template when a template is selected from the dashboard.</p>

4	<p>Email Recipients: Select an existing email list from the drop-down menu under Select List Name or type email address under Email Address.</p> <p>Notes:</p> <ul style="list-style-type: none"> Multiple email addresses can be added. Separate emails with a comma. Do not include a space after the comma. Start directly with the new email. For example: leonardo@davinci.com,m.lisa@davinci.com Duplicate email addresses are removed by the system. <p>Click + to add the email or emails.</p>
5	<p>The added emails are shown in the Items Added box. The number in parentheses is how many email addresses have been added.</p>
6	<p>Email Preview shows the template selected, the email subject, and the email written. If nothing has been written yet, then nothing will show.</p>
7	<p>This area shows the template selected. In the example above, no template was selected, so there is no information.</p>

7.3 Click the **Email Content** tab. See *Figure 21, Email Content Callouts*.

Note: There are templates that require no additional content. In that case, a blue notification opens in the Email Content tab and notes that the email will be sent with no additional input. See *Figure 22, No Inputs Required Blue Notification Banner*.

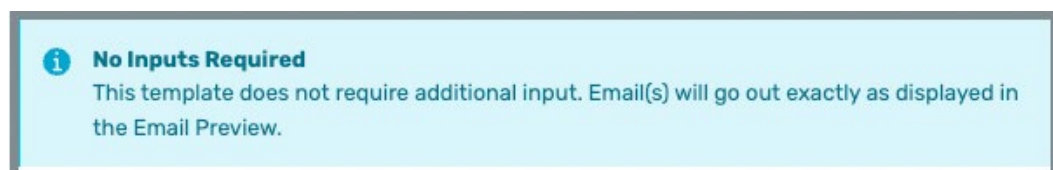


Figure 21: No Inputs Required Blue Notification Banner

7.4 Fill out the information under **Email Content** tab. See *Table 6, Email Content Detailed Callout*.

Notes:

- Some templates have content that must be filled out. For more information on those templates, see [Example of a Completed Template with Fillable Fields](#).
- Links can be included in any email.
- Images can be copied and pasted in any email. Be aware that an image cannot be sent by itself; there must be written email content as well.

Ctrl + C on the keyboard = Copy an image

Ctrl + V on the keyboard = Paste an image

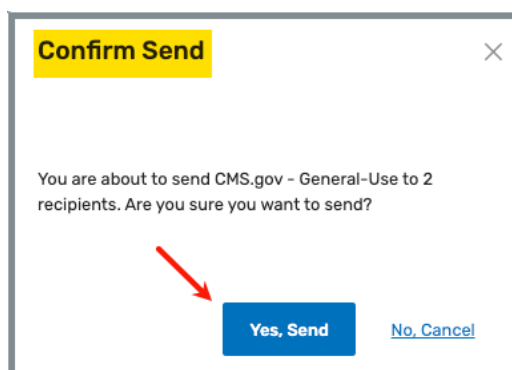
The screenshot shows the 'Compose' email interface. At the top, there is a 'Compose' button (yellow) and 'Cancel' and 'Send Email' buttons (blue). The 'Email Content' tab is selected, indicated by a red circle 1. The 'Email Details' section on the left includes a 'Subject' field (red circle 2) containing 'A message regarding your care.' and a 'Body' field (red circle 3) containing a message about Dr. Da Vinci's practice change. The body text is: 'Dear Mr. Michelangelo, I understand you have been seeing Dr. Da Vinci for your arthritis. Dr. Da Vinci has decided to devote his practice to Senora M. Lisa and will no longer be seeing other patients. We have assigned you to Dr. Raphael. Please let us know if you have any questions. Yours sincerely, CMS'. A red circle 4 highlights the bottom of the body field, which shows '55 words' and 'Remaining Characters: 49689/50000'. On the right, the 'Email Preview' section (red circle 5) shows a preview of the email, including the CMS logo and the same body text. A red circle 6 highlights the 'Send Email' button.

Figure 22: Email Content Callouts

Table 6: Email Content Detailed Callout

Callout	Detailed Explanation
1	Email Content: Select this tab to fill out the content of the email.
2	Subject: The subject is dependent on the template chosen and is automatically filled. The subject line can be updated, depending on the template chosen.
3	Edit controls: Hover over the edit controls to see the tool tip. Select the horizontal ellipsis to see more controls. Note: The ellipsis only shows when the screen is a reduced size. If there is no ellipsis, all the commands are shown.
4	Body: Type the email, if applicable. Drag the bottom right of the field to expand the area in which to write, if desired. The body of the email can be updated, depending on the template chosen.
5	Email Preview: Preview the email. Note: Nothing can be updated in the preview area. Return to the left side of the screen to make any updates.
6	Click Send Email to send the email.

- 7.5 Click **Send Email**. The **Confirm Send** pop-up window opens. See *Figure 23, Confirm Send Pop-Up Window*.

**Figure 23: Confirm Send Pop-Up Window**

- 7.6 Click **Yes, Send**.
- 7.7 Verify the green notification bar appears on the top of the screen that says **Successfully sent to [number] recipients**. See *Figure 24, Successfully Sent Green Notification Bar*.

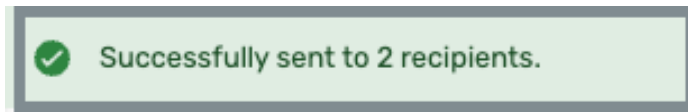


Figure 24: Successfully Sent Green Notification Bar

8. Redirect an Email

Purpose: Forward an email.

- 8.1 Click **EMAIL INFORMATION** on the left menu. The **Email Information** page opens.
- 8.2 Select the email to redirect.
- 8.3 Click the vertical ellipsis under the **Actions** menu. See *Figure 25, Actions Drop-Down Menu*.

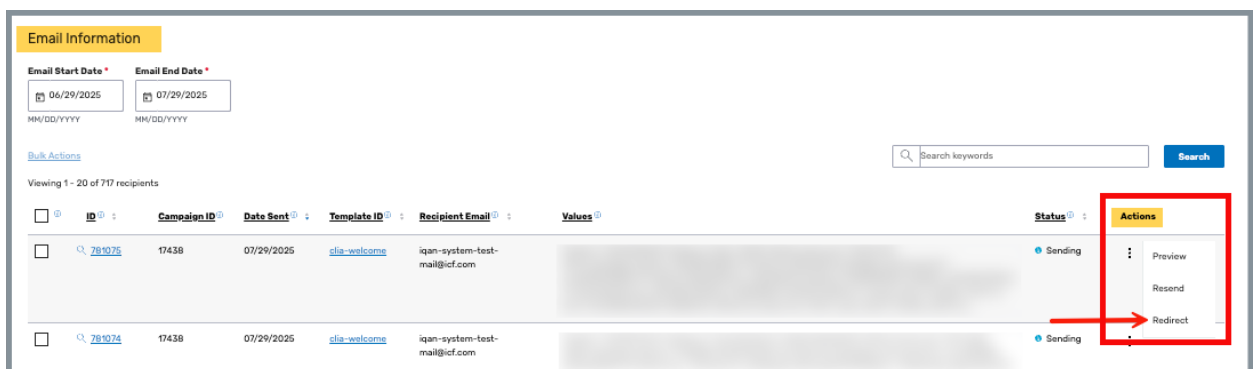


Figure 25: Actions Drop-Down Menu

- 8.4 Select **Redirect**. The **Redirect Email** pop-up window opens. See *Figure 26, Redirect Email Pop-Up Window*.

Figure 26: Redirect Email Pop-Up Window

8.5 Select an email list name from **Select List Name**.

Notes:

- The total number of email addresses added is displayed, followed by a list of those addresses.
- An additional field opens. Type CONFIRM in the field to confirm redirect (as outlined in step below).

8.6 Click **Add**.

Note: To add additional email to be redirected:

- a. Type email address in **Email Address** field.

Note: Multiple emails can be added at the same time. Be sure to add them with commas, but no spaces. It is also possible to select emails from the [Recipient List](#).

- b. Click the plus + icon.
- c. Verify the email was added to the **Emails Added** field.

8.7 Type **CONFIRM**. See *Figure 27, Completed Redirect Email*.

Notes:

- **CONFIRM** must be type in all capital letters.
- **CONFIRM** does not appear when sending more than 100 emails.

Redirect Email

Select email recipient(s) to redirect this message.

Email Recipients

Select List Name

Select one ▼ Add

Email Address +

Emails Added (274)

✕ ✕ ✕

You will be redirecting to 274 recipients. Do you wish to continue?

CONFIRM ✓

Cancel Yes, Redirect

Figure 27: Completed Redirect Email

8.8 Click **Yes, Redirect**.

- 8.9 Verify the **Successfully Sent** green notification banner is shown with the number of recipients. See *Figure 28, Successfully Sent Green Notification Banner*.

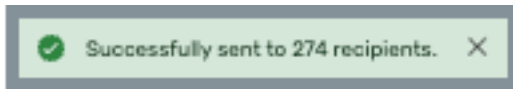


Figure 28: Successfully Sent Green Notification Banner

- 8.10 Verify that **Status** is **Queued**. See *Figure 29, Queued Status*.

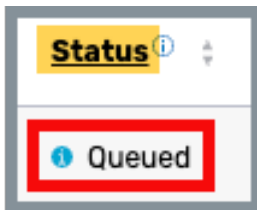


Figure 29: Queued Status

9. Recipient Lists

Purpose: Recipient Lists are email distribution lists. When there is a group of people to whom emails are regularly sent, it saves time to create a list to use when necessary.

Notes:

- Templates are only available for Admin roles.
- Recipient lists are limited to the provider type only. Only the iQAN Admin role can create recipient lists for general use.

9.1 Create a Recipient List

9.1.1 Click **RECIPIENTS LISTS** on the left menu. See *Figure 30, Recipient Lists Left Menu*. The **Recipient Lists** window opens. See *Figure 31, Recipients List Callouts* and *Table 7, Recipient List Callouts Detailed Explanation*.

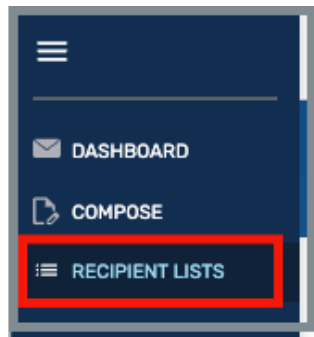


Figure 30: Recipient Lists Left Menu

Recipient Lists

Recipient Lists are saved lists of emails to use for sending.

Viewing 10 recipients lists

1 List ID	Name	Description	Provider Type	Emails Added	Created Date	Actions
foo-list	foo list	foo list desc	General	2	06/08/2023	Actions
bar-list	bar list	bar list desc	CLIA	2	06/21/2023	Actions
123	CLIA Distribution List	CLIA Distribution List	CLIA	1	06/21/2023	2 Actions View List Edit List Delete List
asdf	asdf	asdf	CLIA	1	06/21/2023	Actions
pwb-test	PWB Test #1	PWB Test #1 Desc	General	2	06/21/2023	Actions
rmtest-1	RMTest	Test Distribution List	CLIA	4	06/21/2023	Actions
test-1	Test	Testing 11.1	General	70	06/21/2023	Actions
test-2	CLIA Admins	List for CLIA Admin Usage	CLIA	1	06/21/2023	Actions
test-3	TESTING	Testing is key	General	3	06/21/2023	Actions
test-4	TestTest	New List	General	5002	06/22/2023	Actions

3 [Create List](#)

Figure 31: Recipients Lists Callouts

Table 7: Recipient Lists Detailed Callout

Callout	Detailed Explanation
1	Each heading shows detailed information about the recipient list. The headings can be sorted by clicking the arrows to the right of each heading.
2	Click the Actions drop-down menu to view the list of emails, edit the list of email (add, delete, update) or delete the list. <ul style="list-style-type: none"> Admin roles have a choice of three actions: View List, Edit List, Delete List. User roles can only see View List.
3	Click Create List to create a new list.

9.1.2 Click **Create List** to create a new list. The **Create New Recipient List** window opens. See *Figure 32, Create New Recipient List*.

Create New Recipient List

3 Cancel Create List

1 List Details
Give your Recipient List a unique Name, List ID, and short Description.

List Name *

Provider Type *
Select one

List ID *
Valid characters are a-z, 0-9 and -

Description *

2 Email Addresses
Add email addresses individually or upload your own CSV file(s)

Email Address *

+

Upload CSV

Items Added

Figure 32: Create New Recipient List

9.1.3 Fill out the information. See *Table 8, Create New Recipient List Detailed Callout*.

Table 8: Create New Recipient List Detailed Callout

Callout	Detailed Explanation
1	<p>List Name The name of the list</p> <p>Provider Type Select from drop-down menu, if possible. The selection may be automatic, depending on the user role.</p> <p>List ID Create a unique list ID using letters and numbers, but no special characters</p> <p>Notes:</p> <ul style="list-style-type: none"> • Characters must be lower case • List IDs must be unique to the provider <p>Description Type a description of the list</p>
2	<p>Type each email address, then click +. Each email is added to the Items Added section.</p> <p>Notes:</p> <ul style="list-style-type: none"> • Click Upload CSV to upload a prepared email list. Prepared lists must have one email per line with no additional content, such as actual user name, and must be in one column, not numerous columns. The first row of the prepared email list can be a header row. • Multiple email addresses can be added, but each one must be separated by a comma. Do not include a space after the comma. Start directly with the new email. <p>For example: leonardo@davinci.com,m.lisa@davinci.com</p>
3	Click Create List to create the list.

9.1.4 Click **Create List**. The **Recipients Lists** window opens with the newly-created recipient list.

9.2 Edit a Recipient List

9.2.1 Select **Edit List** under the **Actions** drop-down menu. See Callout 2 in [step 7.1.1](#). The Edit Recipient List window opens. See *Figure 33, Edit Recipient List Window*.

Figure 33: Edit Recipient List Window

9.2.2 Edit any desired details.

Notes:

- Fields that are greyed out cannot be changed.
- Click the **X** next to the email address to remove an email address.
- Click **Upload CSV** to upload an additional CSV.
- Click the **+** to add an email address.

- 9.2.3 Click **Save List**. The **Recipient Lists** window opens. Verify the **Successfully updated recipient list** green notification banner appears. See *Figure 34, Successfully Updated Green Notification Banner*.

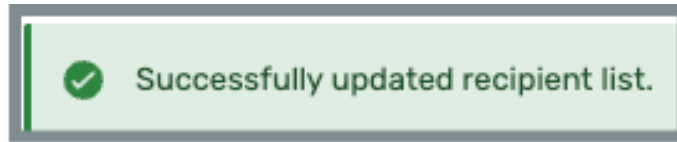


Figure 34: Successfully Updated Green Notification Banner

9.3 Delete a Recipient List

9.3.1 Select **Delete List** under the **Actions** drop-down menu. See Callout 2 in [step 7.1.1](#). The **Delete [Recipient List Name]** pop-up window opens. See *Figure 35, Delete Recipient Pop-Up Window*.

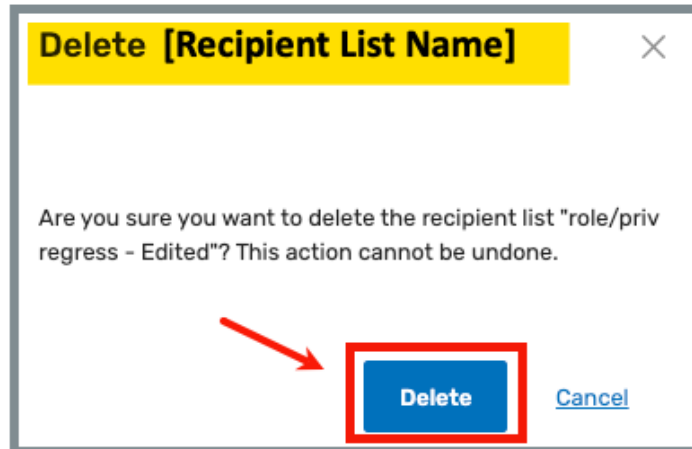


Figure 35: Delete Recipient Pop-Up Window

9.3.2 Click Delete. The **Recipient Lists** window opens. Verify the **Successfully deleted recipient list** green notification banner appears. See *Figure 36, Successfully Deleted Green Notification Banner*.

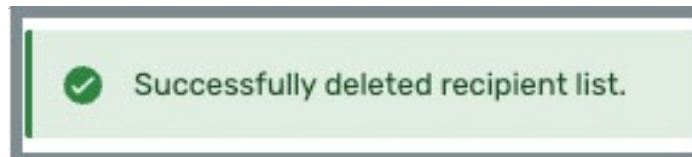


Figure 36: Successfully Deleted Green Notification Banner

10. Templates

Purpose: To create, publish, edit, delete, archive, and duplicate a template.

Notes:

- This function is only available for the **User Admin** and **iQAN Admin** roles.
- There are two kinds of templates: Provider-specific and General. The provider can only see provider-specific templates. General templates are available to all users.
- General templates can only be created by the **iQAN Admin** role.

10.1 Create a Template

10.1.1 Click **TEMPLATES** on the left menu. See *Figure 37, Templates Left Menu*. The **Email Templates** window opens. See *Figure 38, Email Templates Callouts* and *Table 9, Email Templates Callouts Detailed Explanation*.

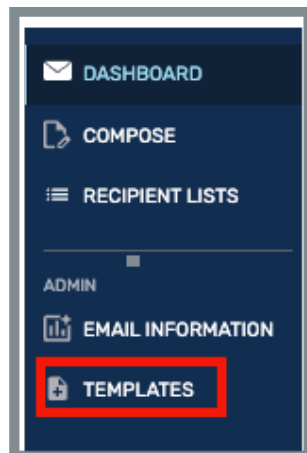


Figure 37: Templates Left Menu

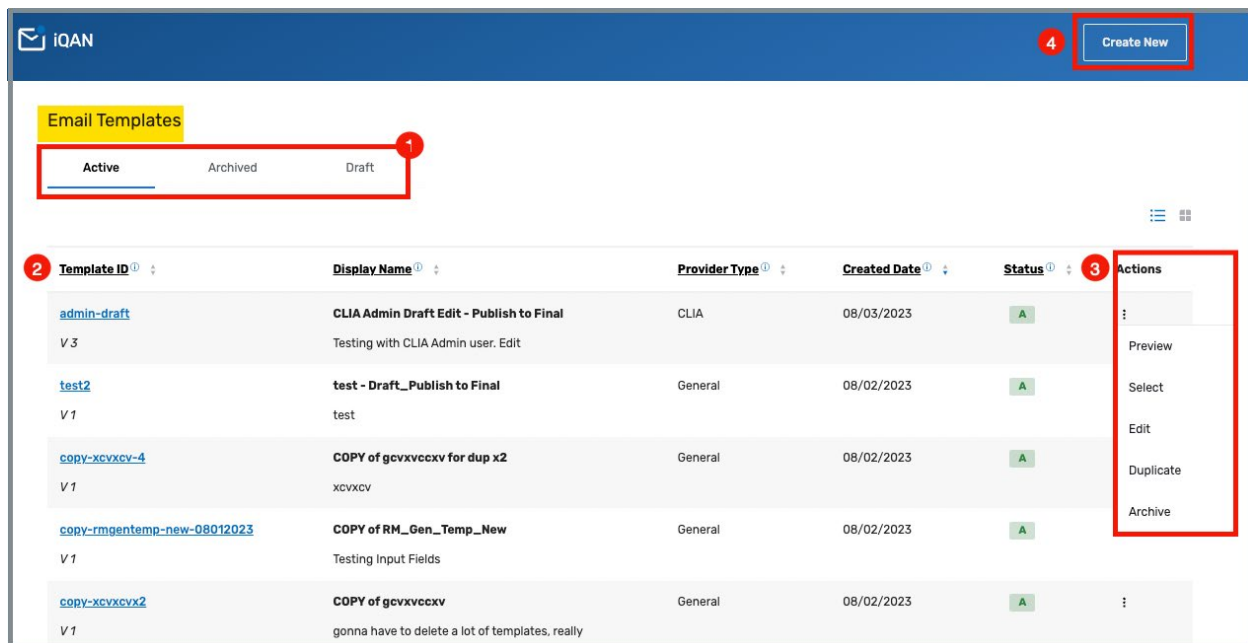


Figure 38: Email Templates Callouts

10.1.2 Click the links in the table below to find out detailed information on that callout.

Table 9: Email Templates Detailed Callout

Callout	Detailed Explanation
1	Click each tab to view active (A), archived (Ar), or draft (D) templates. Only Active templates can be used, but all templates can be updated.
2	Each heading shows detailed information about the email templates. The headings can be sorted by clicking the arrows to the right of each heading. Click the information button next to the column heading to find out further information about each column.
3	Click the Actions drop-down menu to preview, select, edit , duplicate , redirect or archive a template.
4	Click Create New to create a new template.

10.1.3 Click **Create New** to create a new template. The **Create Email Template** window opens. See *Figure 39, Create Email Template*.

The screenshot shows the 'Create Email Template' window. At the top, there is a header bar with the title 'Create Email Template' and a 'Draft' status indicator (1). To the right of the header are buttons for 'Save as Draft', 'Publish as Final', 'Cancel', and 'Create' (7). Below the header is a tabbed interface with three tabs: 'Details' (2), 'Content' (3), and 'Notes' (4). The 'Details' tab is active, showing a form for 'Template Details'. The form includes fields for 'Template Display Name' and 'Template ID' (5), a 'Provider Type' dropdown menu (set to 'CLIA'), an 'Email Subject Line' field, and a 'Template Description' field. A red box highlights the 'Template ID' field and the 'Email Subject Line' field. To the right of the form is a 'Template Preview' section (6) showing a large empty box for the email content. Below the preview is an 'Email Subject Line Preview' section.

Figure 39: Create Email Template

10.1.4 Fill out the information. See *Table 10, Create Email Template Detailed Callout*.

Table 10: Create Email Template Detailed Callout

Callout	Detailed Explanation
1	Shows the status of the template: Draft, Active, or Archived.
2	Details: Select this tab for template header information
3	Content: Select this tab to create the content of the template
4	Notes: Select this tab to add any pertinent notes, if desired.
5	<p>These fields help provide information on the template so it can be easily found. All fields are required.</p> <p>Notes:</p> <ul style="list-style-type: none"> • The Template ID is created by the user. • The Template ID must be unique. • Do not use capital letters for the Template ID. • The Provider Type is greyed out when there is no choice available.
6	Shows a preview of the email. It is blank until the content is created.
7	Select Save as Draft or Publish as Final , as desired. Click Create to create the template.

10.1.5 Click **Content** tab. See *Figure 40, Template Content Tab*.

Details **Content** Notes

Template Content

Users will provide the details of any text that they want to be a part of the template.

- Include `[[body]]` if users are required to enter freeform text. Must be lower case.
- Include `[[field]]` for standard input fields. Ex. "Please contact `[[firstName]]` `[[lastName]]`"
- Users can also paste headers or footers into the template content section as part of the template creation process.

Template Preview

Email Subject Line Preview
The Andrea Template: Lessons in Grammar

Template Content Editor (1):

iQIES

Contact `[[firstName]]` `[[lastName]]` for grammar questions.

Always remember that `[[bookname]]` can guide you.

Never forget to `[[grammarrule]]`

Remember, grammar makes a difference!

Sincerely,
`[[name]]`

24 words

Remaining Characters: 49792/50000

Template Preview (2):

iQIES

Contact `[[firstName]]` `[[lastName]]` for grammar questions.

Always remember that `[[bookname]]` can guide you.

Never forget to `[[grammarrule]]`

Remember, grammar makes a difference!

Sincerely,
`[[name]]`

Figure 40: Template Content Tab

10.1.6 Create the content. See *Table 11, Template Content*.

Table 11: Template Content

Callout	Detailed Explanation
1	<ul style="list-style-type: none"> Content can be as simple as a header (for example, a logo) or a footer (for example, contact information) or can be a complete email. Images can be pasted into the content. Links can be added. Highlight the text and click the link icon. A popup opens and details can be added. Basic formatting (bold, italics, underline, bullets, numbers, justification) of the email is available. To create a field to be filled out when the template is used: <ul style="list-style-type: none"> Use lowercase letters for all field names. Type [[body]] for freeform text. Text can be added under Email Content tab when the email is created. Type field name for standard input fields. For example, type Dear [[firstName]] [[lastName]].
2	Verify the content under Template Preview .

Note: See *Figure 41, Example of a Completed Template with Fillable Fields* for an example of a completed template.

Compose

Email Details

Email Content

Email Content

name *

bookname *

lastname *


firstname *

grammarrule *

Email Preview

Email Subject Line Preview

The Andrea Template: Lessons in Grammar

 iQIES

Contact [[firstname]] [[lastname]] for grammar questions.
Always remember that [[bookname]] can guide you.
Never forget to [[grammarrule]]
Remember, grammar makes a difference!
Sincerely,
[[name]]

Figure 41: Example of a Completed Template with Fillable Fields

10.1.7 Add notes, if desired. Click the **Notes** tab. See *Figure 42, Notes Tab*.

Details Content **Notes**

Template Notes

- Enter any Notes regarding the creation or editing of this specific Template here.
- These Notes appear in this section only.

Remember to send this out on the first of every month.

11 words

Remaining Characters: 49946/50000

Save Notes

Template Preview

Email Subject Line Preview
The Andrea Template: Lessons in Grammar

iQIES

Contact [[firstname]] [[lastname]] for grammar questions.
Always remember that [[bookname]] can guide you.
Never forget to [[grammarrule]]
Remember, grammar makes a difference!
Sincerely,
[[name]]

Figure 42: Notes Tab

10.1.8 Click **Save Notes**. The note is saved, and the screen remains the same.

10.2 Publish Template or Save as a Draft

10.2.1 Click **Save as Draft** to save template as a draft. Click **Publish as Final** to publish the template for provider-specific use. See *Figure 43, Save*.



Figure 43: Save

10.2.2 Verify **Successfully created template** banner shows, and the new template is listed in the correct tab. See *Figure 44, Successfully Created Template*.

Note: The arrow in the figure below points to the version control of the template. Each time the template is updated, the version number updates. Version control only starts with publication, i.e., documents in draft form all have V1 until published.

Template ID	Display Name	Provider Type	Created Date	Status	Actions
a752 V 1	The Andrea Template Grammar. It's not just for technical writers.	CLIA	08/08/2023	A	⋮
admin-draft V 3	CLIA Admin Draft Edit - Publish to Final Testing with CLIA Admin user. Edit	CLIA	08/03/2023	A	⋮

Figure 44: Successfully Created Template

10.3 Edit a Template

10.3.1 Select **Edit** under the **Actions** drop-down menu next to the template that needs to be edited. See [Template Callout Details](#). The **Edit Email Template** window opens. See *Figure 45, Edit Email Template Window*.

Note: General Templates can only be edited in the iQAN Admin role.

Edit Email Template Active

Version 3 | Last Modified on 08/08/2023

☐ Save as Draft ☒ Publish as Final [Cancel](#) [Save](#)

Details Content Notes

Template Details

Template Display Name *
The Andrea Template

Template ID *
a752
Valid characters are a-z, 0-9 and -

Provider Type *
CLIA

Email Subject Line *
The Andrea Template: Lessons in Grammar
Enter [[subject]] to allow users to customize text in the subject line. Ex. "CMS.GOV - [[subject]]"

Template Description *
Grammar. It's not just for technical writers.

Template Preview

Email Subject Line Preview
The Andrea Template: Lessons in Grammar

iQIES

Contact [[firstname]] [[lastname]] for grammar questions.

Always remember that [[bookname]] can guide you.

Never forget to [[grammarrule]]

Remember, grammar makes a difference!

Sincerely,
[[name]]

Figure 45: Edit Email Template Window

10.3.2 Edit any desired details.

Notes:

- Fields that are greyed out cannot be changed.
- Update information on any of the three tabs: **Details**, **Content**, or **Notes**.

10.3.3 Click **Save**. The **Recipient Lists** window opens. Verify the **Successfully updated recipient list** green notification banner appears. See *Figure 46, Successfully Updated Template Green Notification Banner*.

Notes:

- **Save** is greyed out until any changes are made.
- A published template cannot be returned to **Save as Draft**.
- The prior version of the template is automatically moved to **Archive**.

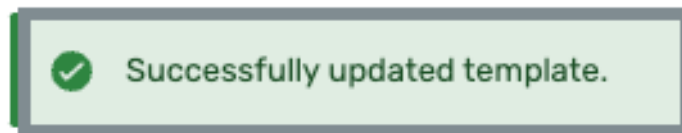


Figure 46: Successfully Updated Template Green Notification Banner

10.4 Delete or Archive a Template

Notes:

- Only draft templates can be deleted.
- Published templates cannot be deleted. They must be archived. Select **Archive** from the drop-down menu under **Actions** to archive a template.

10.4.1 Select **Delete Draft** under the **Actions** drop-down menu next to the template that needs to be edited. See *Figure 47, Edit Email Template Window*. The **Delete Email Template** window opens. See *Figure 48, Do You Wish To Delete This Draft?*

Note: Templates are user specific and can only be deleted by the user who created them.

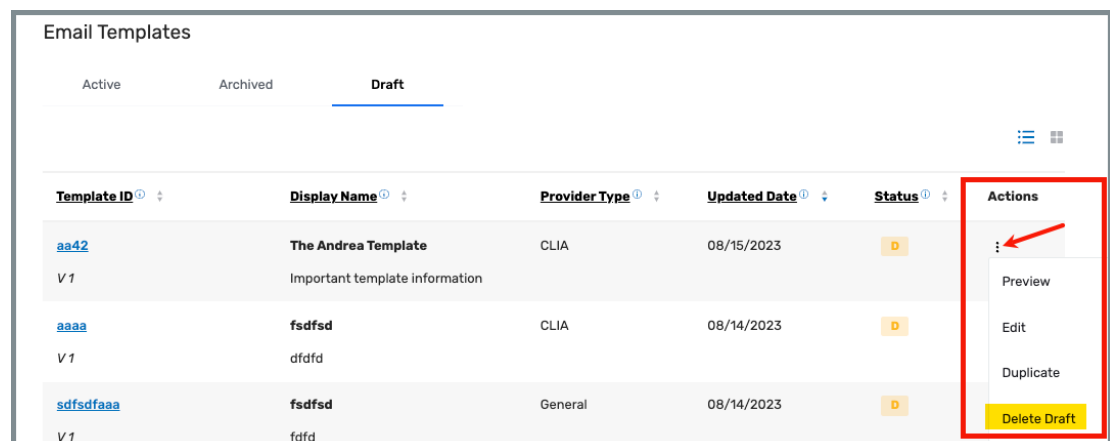


Figure 47: Delete Draft Template Pop-Up Window

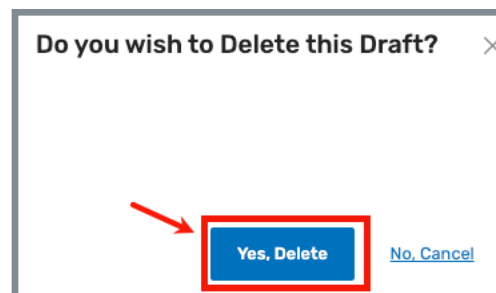


Figure 48: Do You Wish To Delete This Draft?

10.4.2 Click **Yes, Delete**. The **Email Templates** window opens. Verify the **Successfully deleted template** green notification banner appears. See *Figure 49, Successfully Deleted Template Green Notification Banner*.

Note: Refresh the iQIES page to verify the draft was deleted.

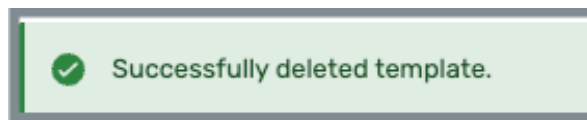


Figure 49: Successfully Deleted Template Green Notification Banner

10.5 Duplicate a Template

Note: Only draft templates can be deleted.

10.5.1 Select **Duplicate** under the **Actions** drop-down menu next to the template to duplicate. See [Template Callout Details](#). The **Duplicate Email Template** window opens. See *Figure 50, Duplicate Email Template*.

Note: The template is now in draft form, and the version has started at V1 again.

Duplicate Email Template Draft

Version 1 | Last Modified on 08/08/2023

Save as Draft Publish as Final Cancel Create

Details Content Notes

Template Details

Template Display Name * COPY of The Andrea Template

Template ID * copy-a752

Valid characters are a-z, 0-9 and -

Provider Type * CLIA

Email Subject Line * The Andrea Template: Lessons in Grammar

Enter [[subject]] to allow users to customize text in the subject line. Ex. "CMS.GOV - [[subject]]"

Template Description * Grammar. It's not just for technical writers. It's for everyone!

Template Preview

Email Subject Line Preview
The Andrea Template: Lessons in Grammar

iQIES

Contact [[firstname]] [[lastname]] for grammar questions.

Always remember that [[bookname]] can guide you.

Never forget to [[grammarrule]]

Remember, grammar makes a difference!

Sincerely,
[[name]]

Figure 50: Duplicate Email Template

10.5.2 Update the **Template Display Name** and **Template ID**.

Note: These fields must be updated.

10.5.3 Update any other information desired.

10.5.4 Save as desired.

10.6 Version a Template

Notes:

- When an active template is archived, it is stored in the **Archived** tab as a version of the original template. The active template then becomes the latest version in the version history.
- If a previous version is reactivated, the current active template is moved to the **Archived** tab with its existing version number. The reactivated template becomes the active version and is displayed as such in the system. See *Figure 51, Template Version*.

Note: The original template is assigned **Version 1**. Each subsequent update increments the version number sequentially.

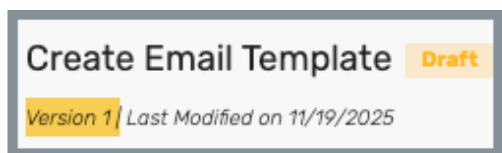


Figure 51: Template Version

10.6.1 Archive an Active Template

- The active template is saved in the **Archived** tab as a version of the original template.
- The template retains its version number in the **Archived** tab. See *Figure 52, Archived Original Template*.

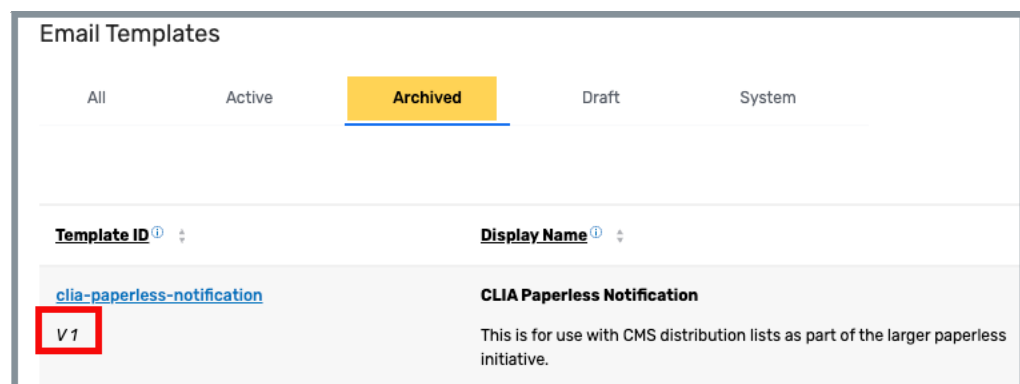


Figure 52: Archived Original Template

10.6.2 Activate a Previous Version of the Template

- Select the desired version from the **Archived** tab.
- Reactivating this version moves the current active template to the **Archived** tab with its current version number.
- The selected version becomes the active template and is displayed as the latest version. See *Figure 53, Updated Active Template*.

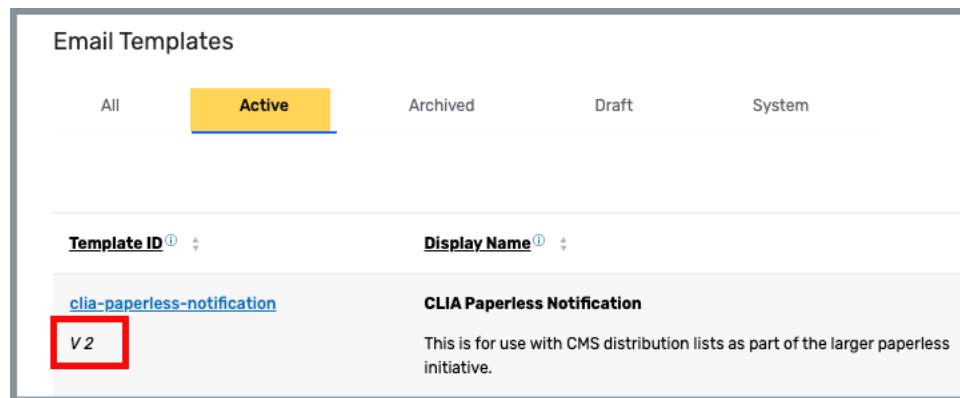


Figure 53: Updated Active Template

11. Admin Email Information

Purpose: To view and resend emails.

Notes:

- This function is only available for the **User Admin** and **iQAN Admin** roles.
- Select more than one line using the select boxes at the left to do a bulk resend. Bulk actions buttons then become available.
- Confirmation is required when more than 100 emails are resent.
- The maximum number of emails to resend is 300.

Click **EMAIL INFORMATION** on the left menu. See *Figure 54, Email Information Left Menu*. The **Email Information** window opens. See *Figure 55, Email Information*, and *Table 12, Email Information Detailed Callout*.

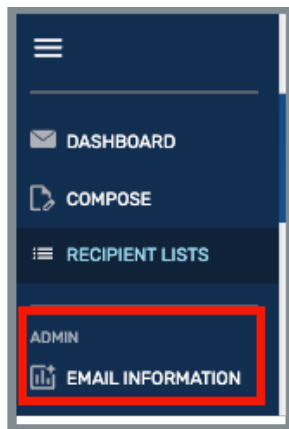


Figure 54: Email Information Left Menu

Email Information

Email Start Date * **Email End Date *** **a**

MM/DD/YYYY MM/DD/YYYY

Bulk Actions **c** **Search**

Viewing 1 - 20 of 719 recipients

<input type="checkbox"/>	ID ^①	Campaign ID ^①	Date Sent ^①	Template ID ^①	Recipient Email ^①	Values ^①	Status ^①	Actions
<input type="checkbox"/> b	781077	17328	07/29/2025	clia-welcome	iqan-system-test-mail@icf.com	("labCon": "04D2326379"; "labName": "ARC ARE 162"; "labPhoneNumber": "(501) 431-2643"; "stateAgencyName": "HEALTH FACILITY SERVICES SLOT H9"; "stateAgencyContactInfo": "...	Awaiting Details	d Preview Resend Redirect
<input type="checkbox"/>	781076	17438	07/29/2025	clia-welcome	iqan-system-test-mail@icf.com	("labCon": "52D2285852"; "labName": "MILL POND"; "labPhoneNumber": "(262) 534-7297"; "stateAgencyName": "DEPARTMENT OF HEALTH SERVICES"; "stateAgencyContactInfo": "...	Sending	

Figure 55: Email Information

Table 12: Email Information Detailed Callout

Callout	Detailed Explanation
a	Email Start/End Date: Type or select Start and End Dates to search for emails sent during that specific time period.
b	Select box next to email desired to open email or perform actions. Selection is most helpful when choosing more than one email. When more than one email row is selected and resent, a pop-up window opens and notes that more than one email will be resent. Click Yes, Send to continue.
c	Type keyword in the search bar. Click Search . Search reviews all emails for the keyword.
d	An email can be viewed, resent, or redirected . It cannot be deleted.