Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

iQIES Announcement and Notification System (iQAN)

Version 1.1

December 5, 2025

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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*.

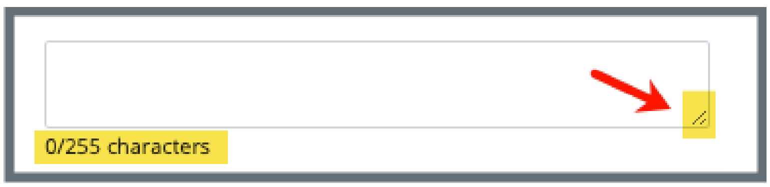

Figure 1: Expandable Field

- 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.*

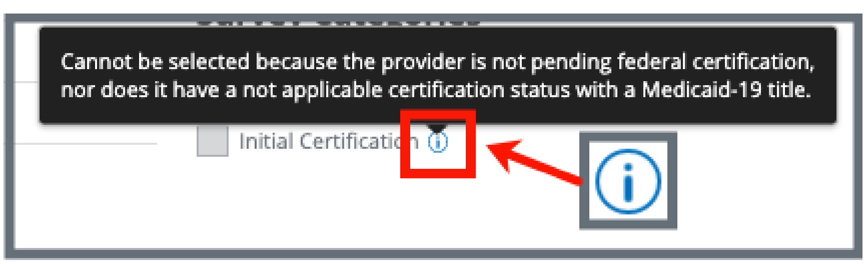

Figure 3: Tool Tip Icon

- 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.

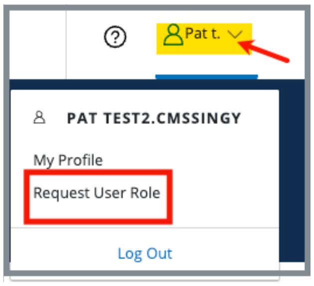

Figure 4: Request User Role

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

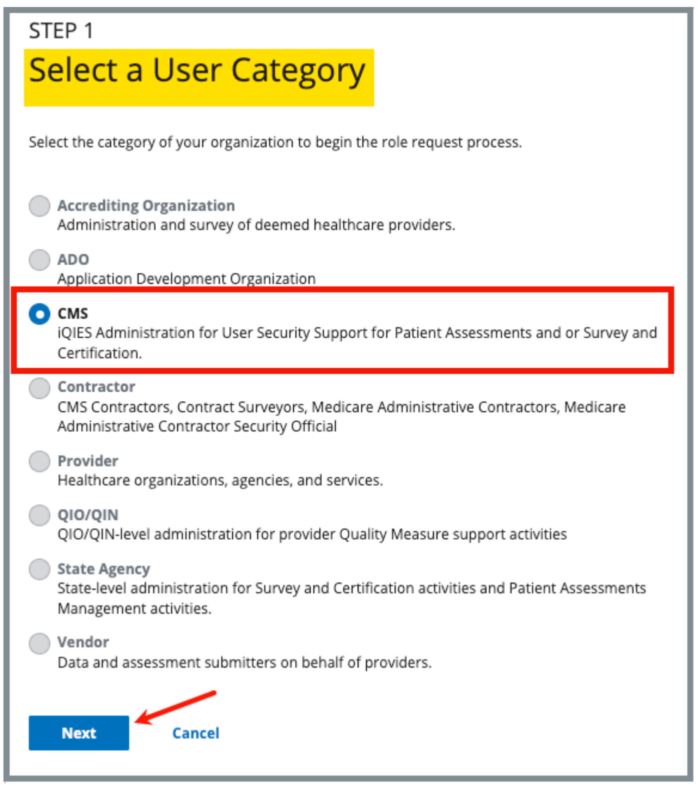

Figure 5: Select a User Category

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

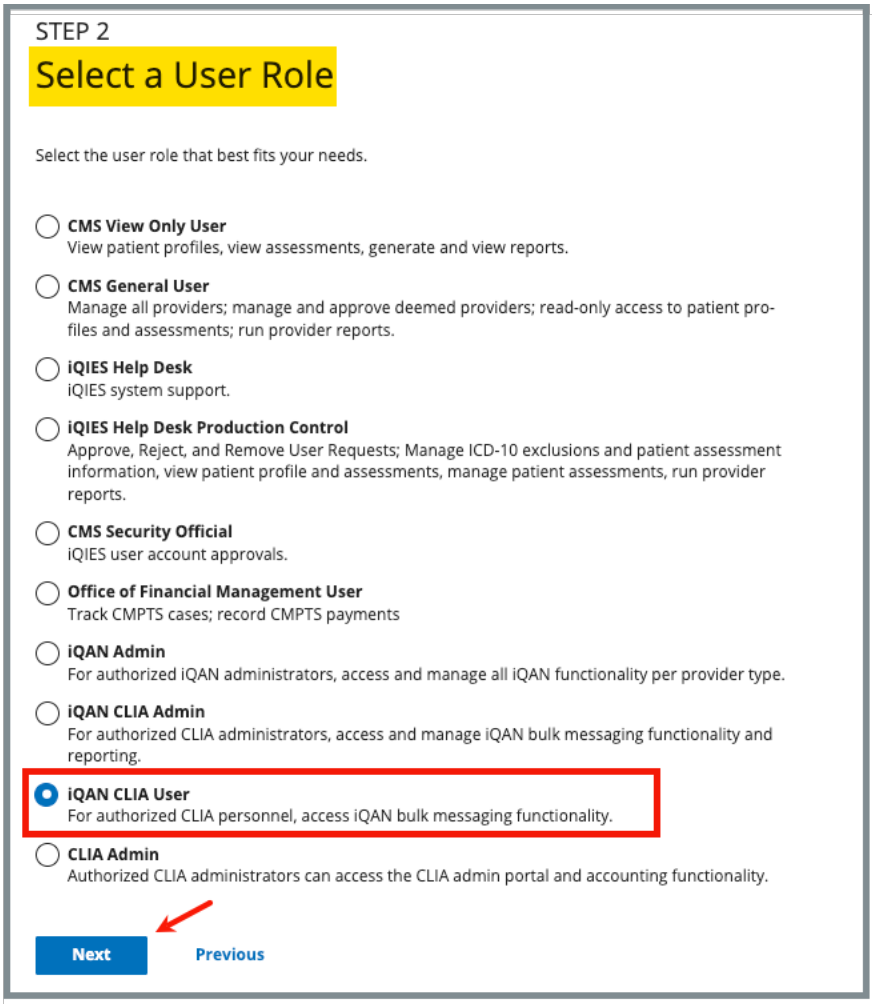

Figure 6: Select a User Role

4.6 Select **iQAN CLIA User**.

4.7 Click **Next**. The **Add Organizations** window opens. See *Figure 7, Add Organizations*.

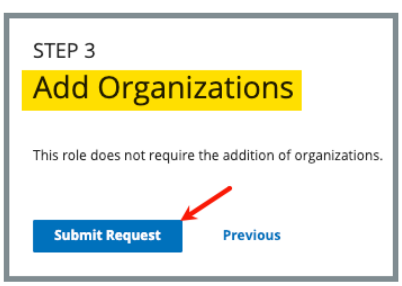

Figure 7: Add Organizations

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.]

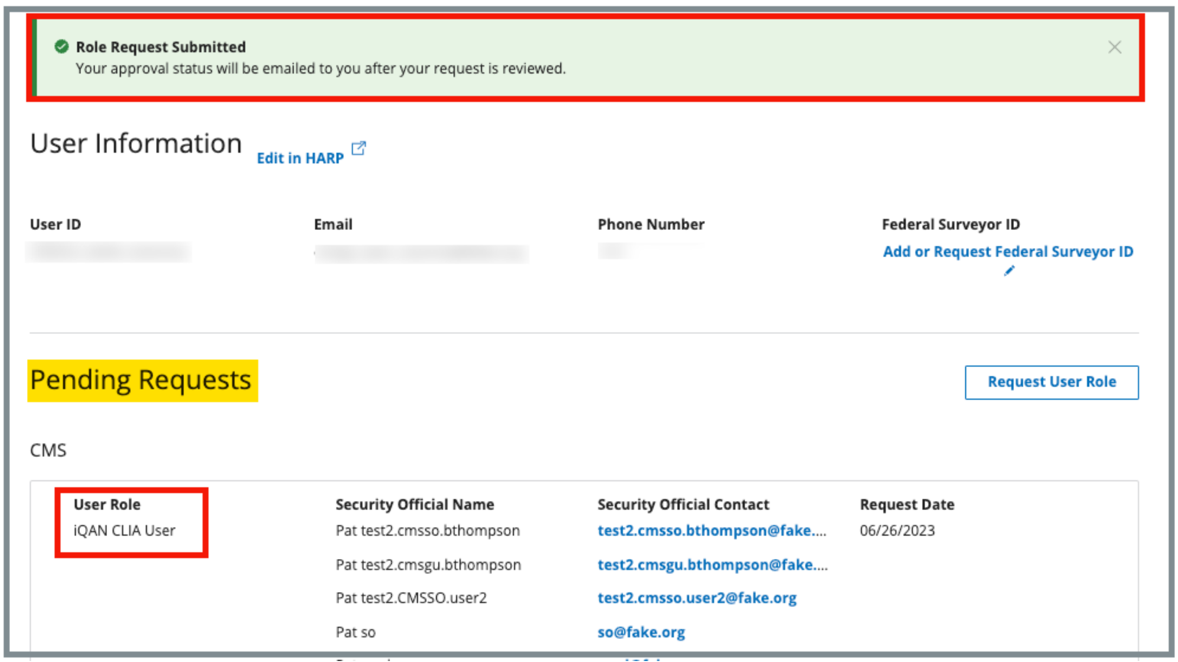

Figure 8: Role Request Submitted Green Notification Bar and Pending Requests

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.

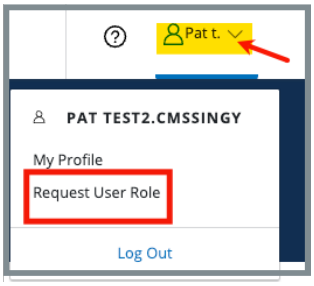

Figure 9: Request User Role

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

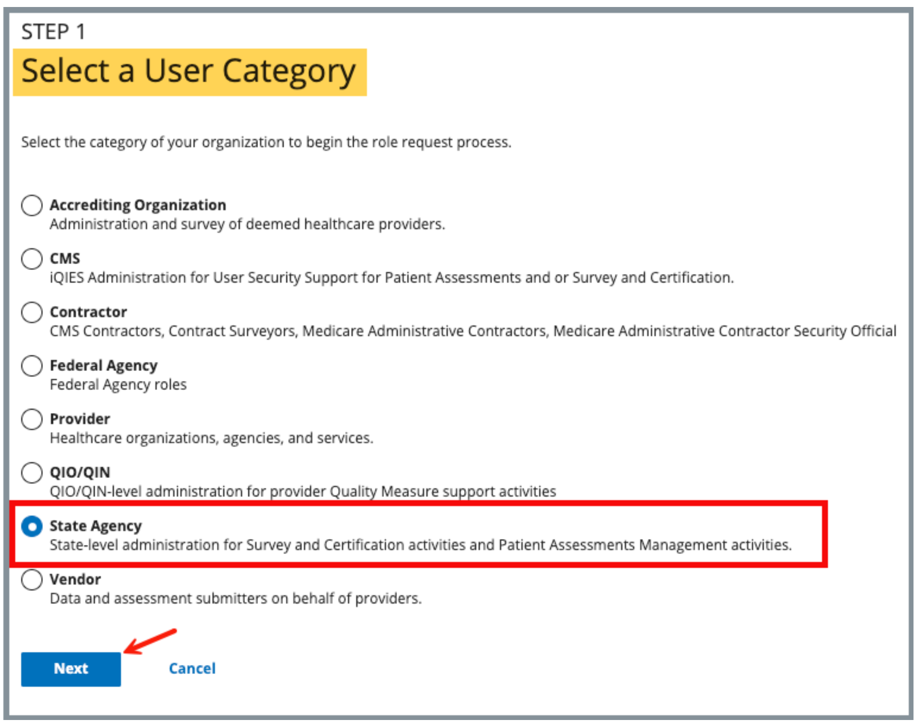

Figure 10: Select a User Category

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

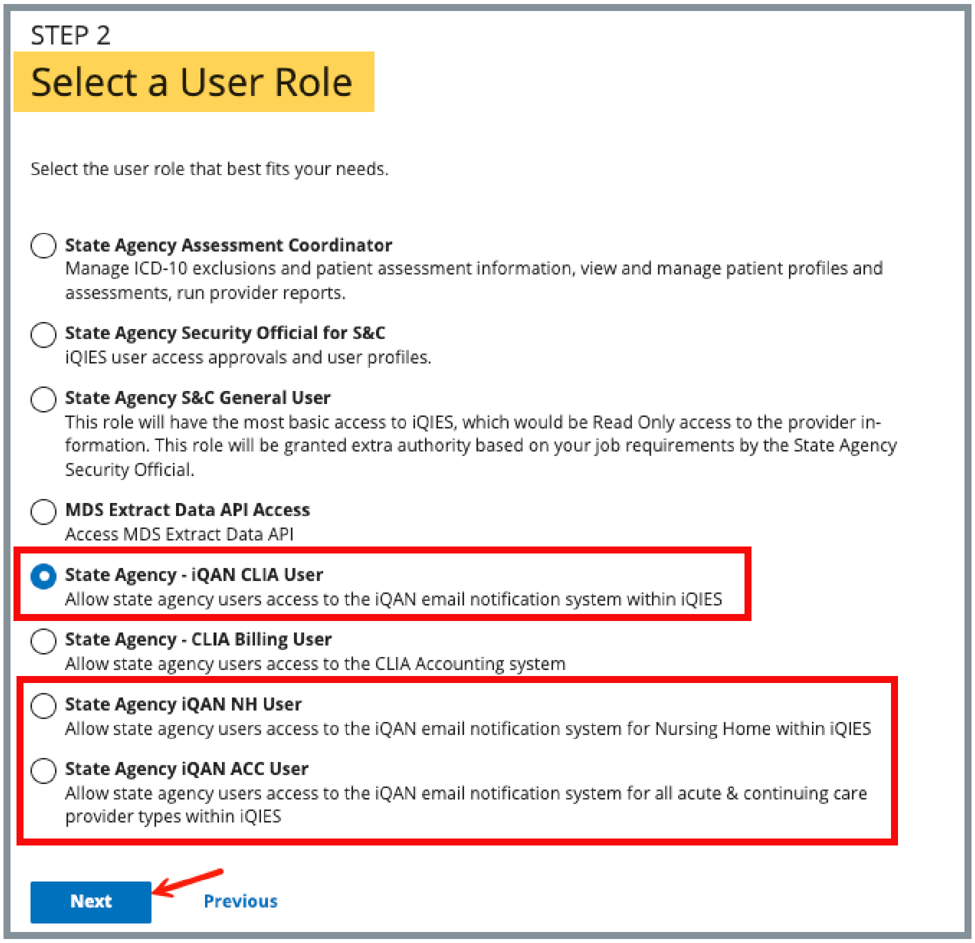

Figure 11: Select a User Role

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

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

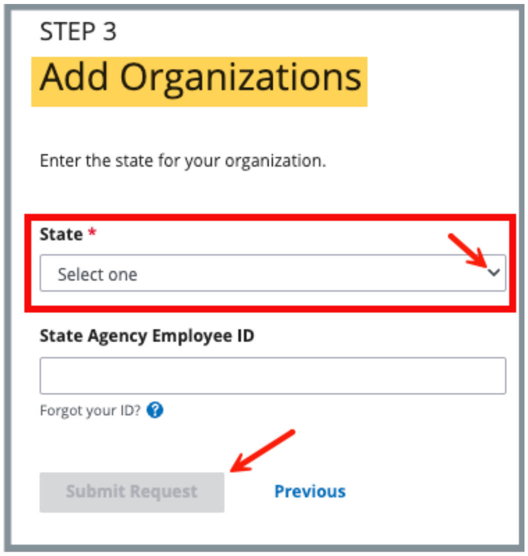

Figure 12: Add Organizations

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.

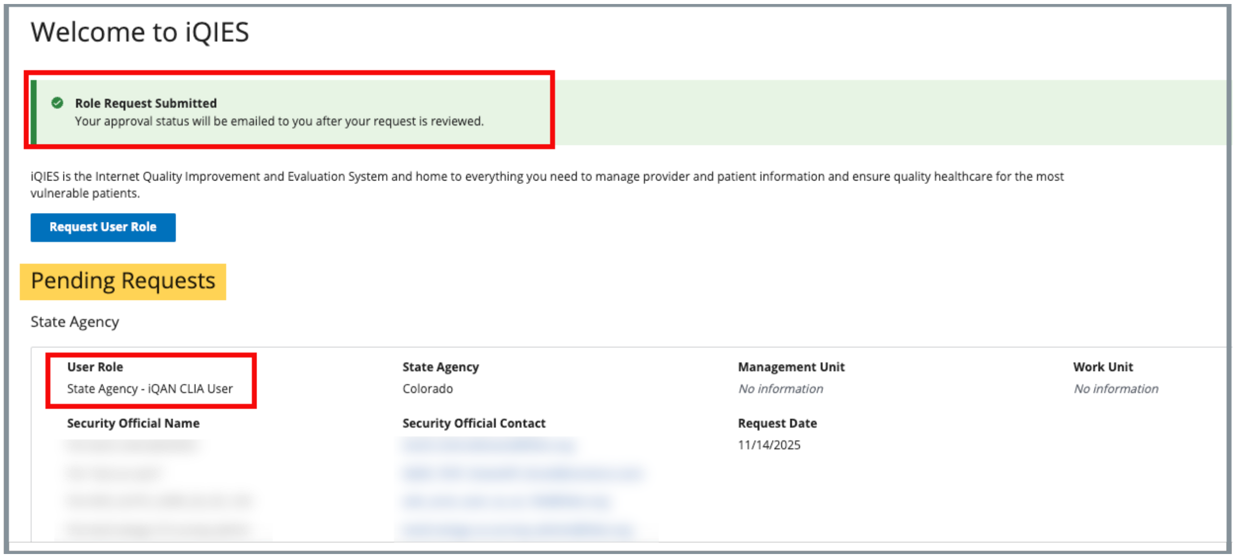

Figure 13: Role Request Submitted Green Notification Bar and Pending Requests

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.*

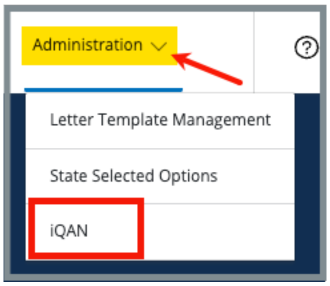

Figure 14: iQAN Administration

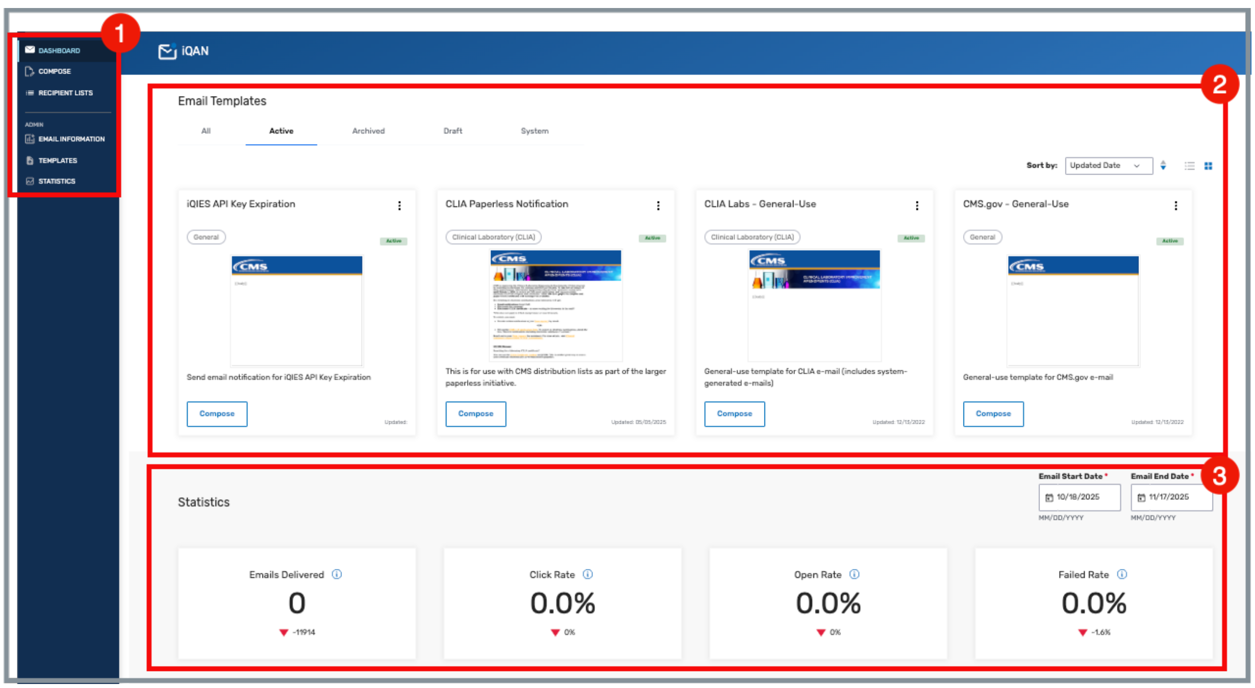

Figure 15: iQAN Dashboard

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.*

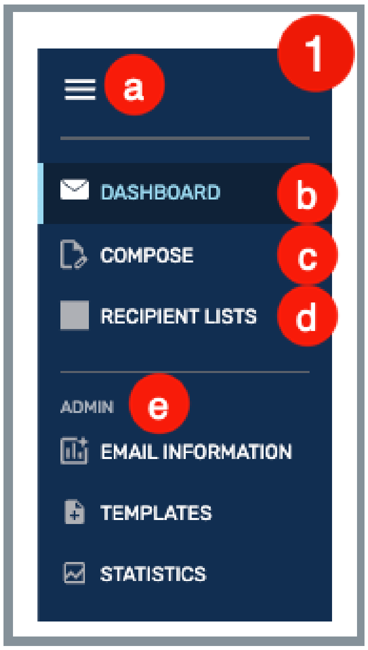

Figure 16: iQAN Dashboard Left Menu Callout 1

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	Click **EMAIL INFORMATION** to review sent emails. Click **TEMPLATES** to create, update or edit a template. Click **STATISTICS** to view the statistics. Statistics are shown as a default on the dashboard **Note**: These actions are only available to **Admin** users and are not shown on the general user role.

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*.

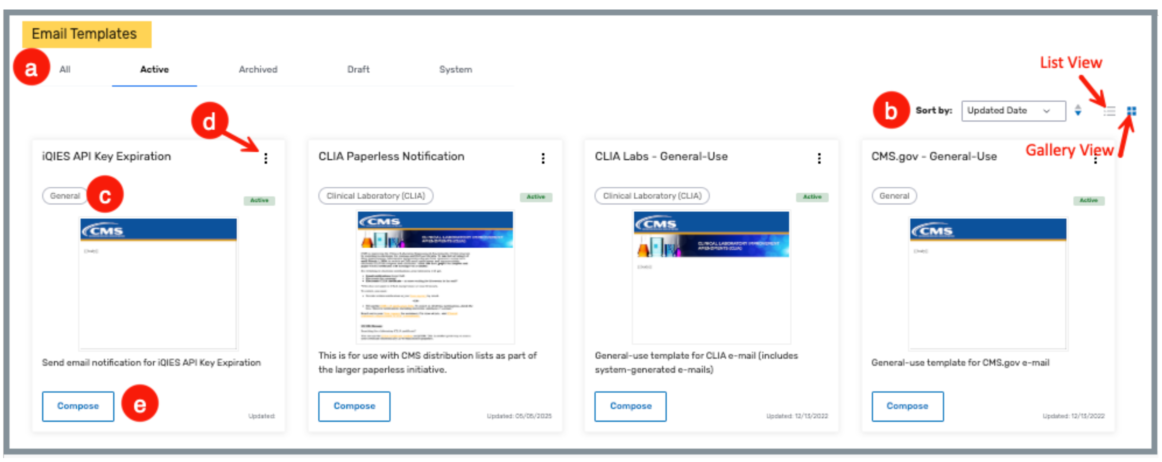

Figure 17: iQAN Dashboard Email Templates Callout 2

Table 3: iQAN Dashboard Email Templates Callout 2 Details

Callout	Detailed Explanation
a	**Note**: Only **Admin** user roles can view all five tabs. All other user roles see only the **Active** tab. The **Active** tab shows existing templates for use. The iQAN Admin user role can view **Archived, Draft**, and **System** templates.
b	The templates can be sorted by **Template ID**, **Display Name**, **Provider Type**, **Updated Date**, and **Status**. Click the right icon to view the templates as a gallery. This is the default view. Click the left list icon to view the templates in a detailed list. The blue highlighted view icon is the icon in use. iQAN defaults to the gallery view.
c	Each template has one provider type tagged. • 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*.

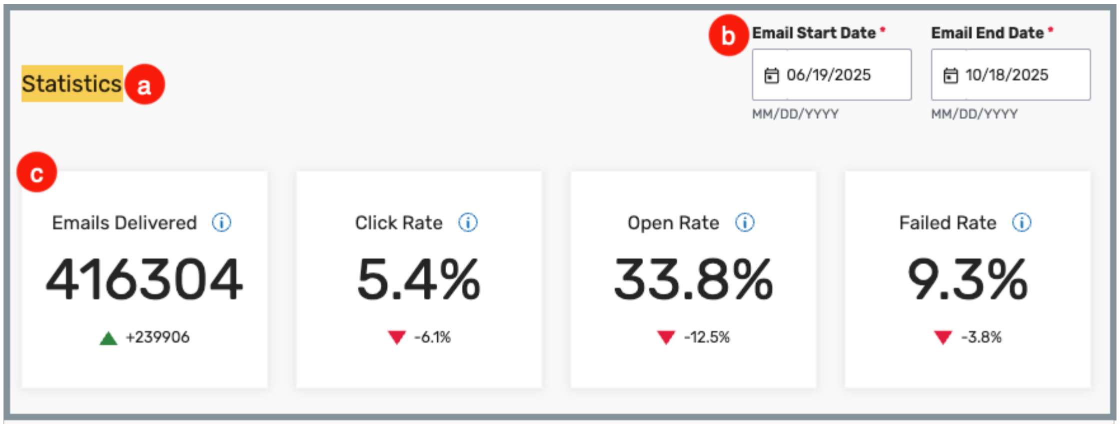

Figure 18: iQAN Dashboard Statistics Callout 3

Table 4: iQAN Dashboard Statistics Callout 3 Details

Callout	Detailed Explanation
a	**Delivery Statistics** show detailed information on: • 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 The triangles below the number/percentage shows the trending percentage up (green triangle) or down (red triangle).
b	Type the start/end date to view detailed statistics for a specific time period. **Note**: The search is limited to a one-year time period.
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.

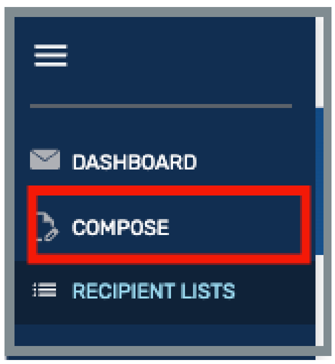

Figure 19: Compose/Email Details

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.

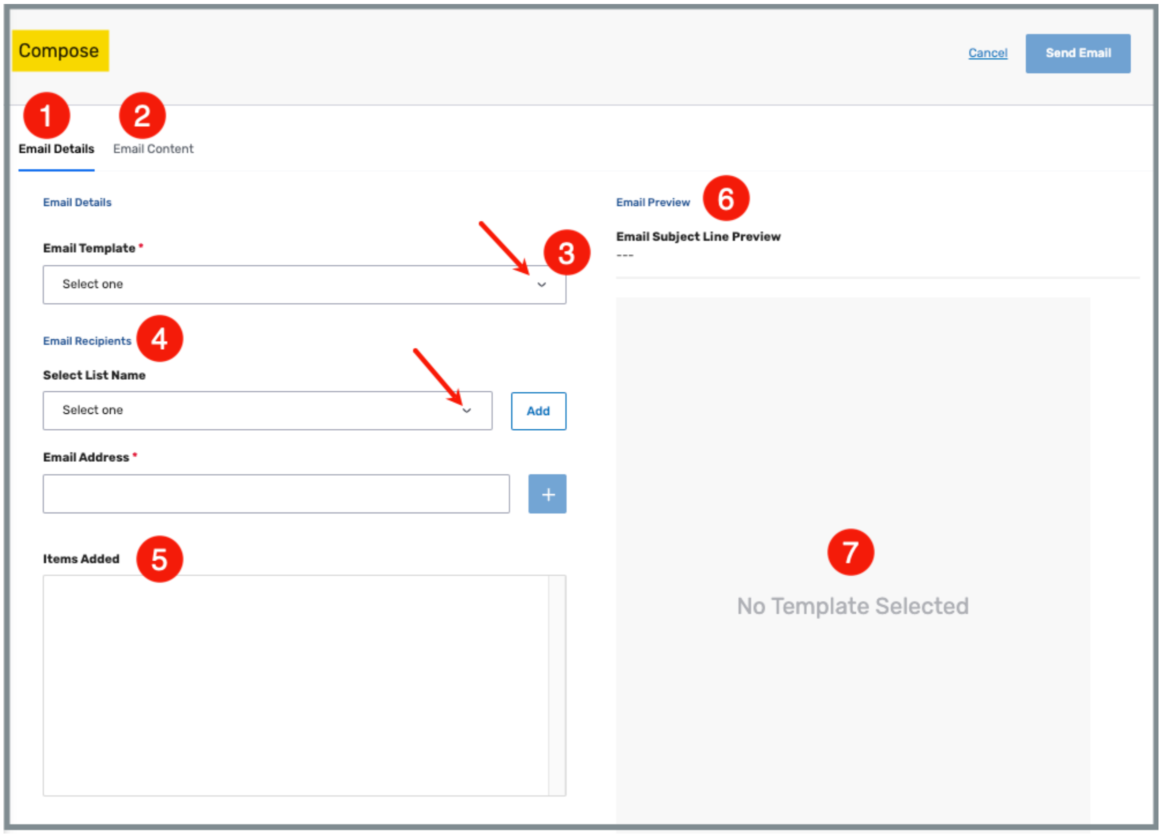

Figure 20: Email Details Callouts

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	**Email Template**: Select an existing template from the drop-down list. **Note**: The template name shows directly under **Email Template** when a template is selected from the dashboard.

4	**Email Recipients:** Select an existing email list from the drop-down menu under **Select List Name** or type email address under **Email Address**. **Notes:** • 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. Click **+** to add the email or emails.
5	The added emails are shown in the **Items Added** box. The number in parentheses is how many email addresses have been added.
6	**Email Preview** shows the template selected, the email subject, and the email written. If nothing has been written yet, then nothing will show.
7	This area shows the template selected. In the example above, no template was selected, so there is no information.

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

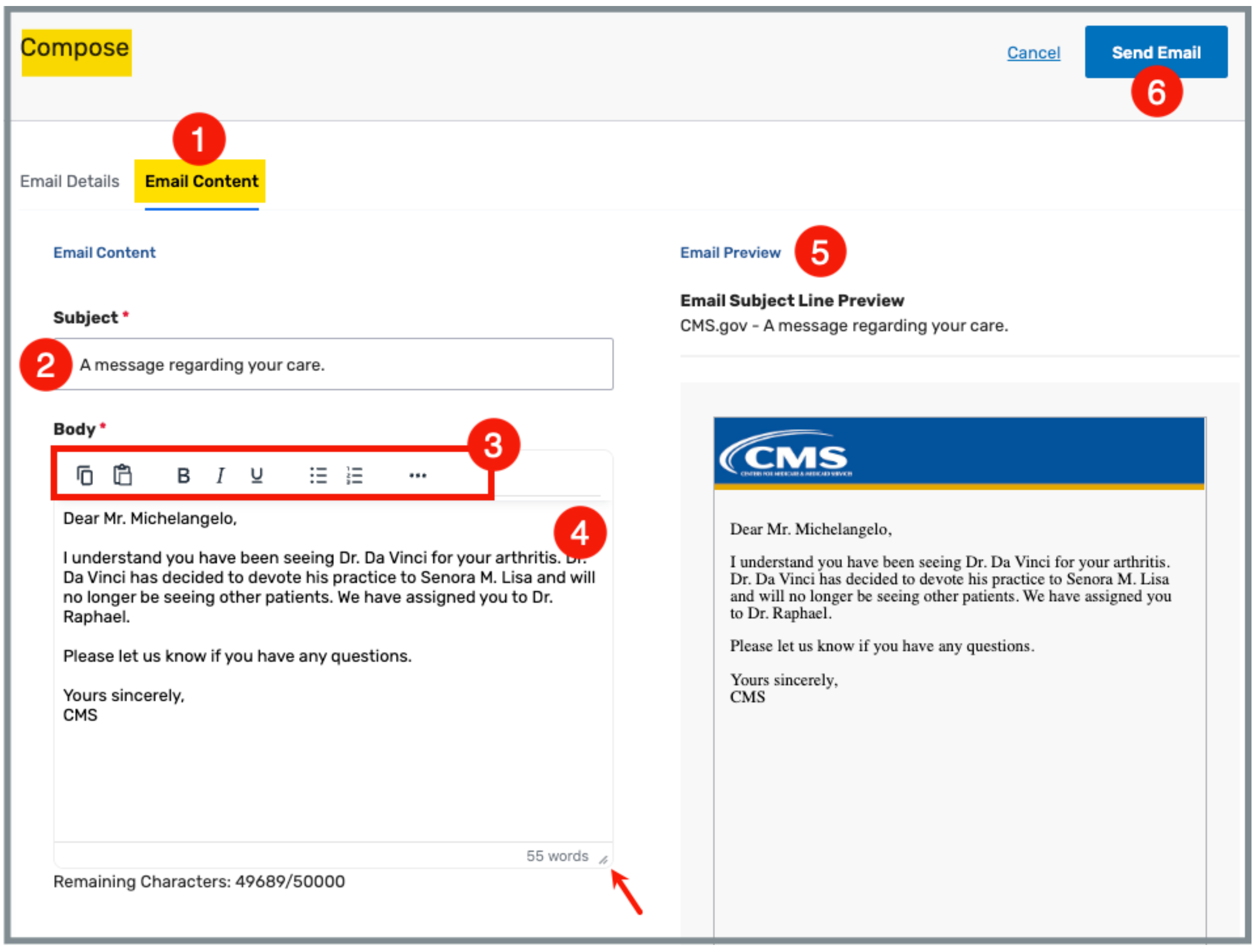

Figure 22: Email Content Callouts

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.*

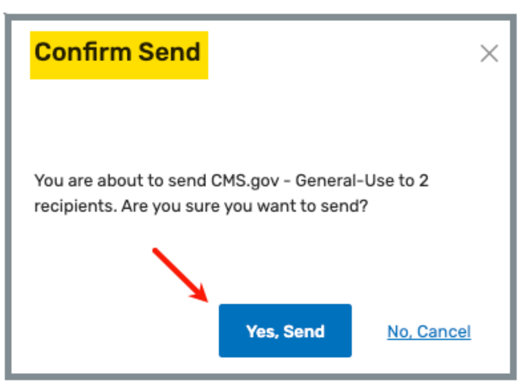

Figure 23: Confirm Send Pop-Up Window

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.*

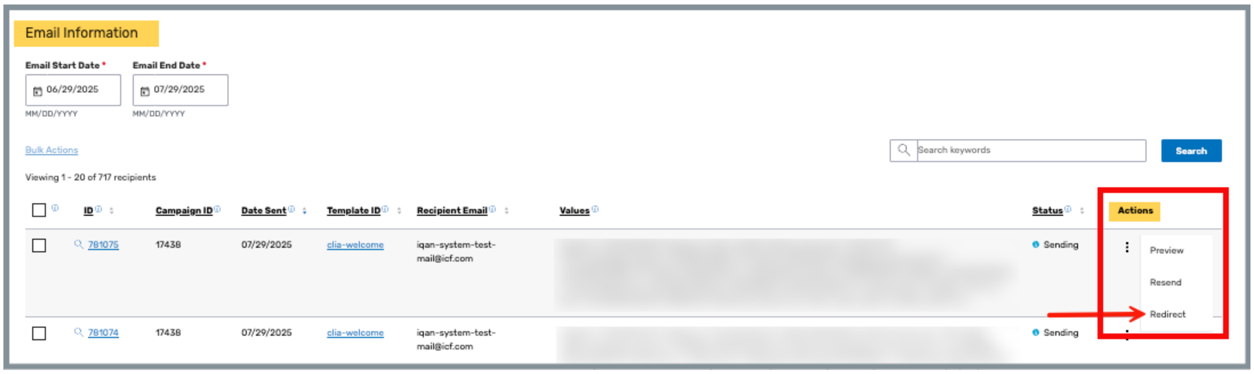

Figure 25: Actions Drop-Down Menu

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

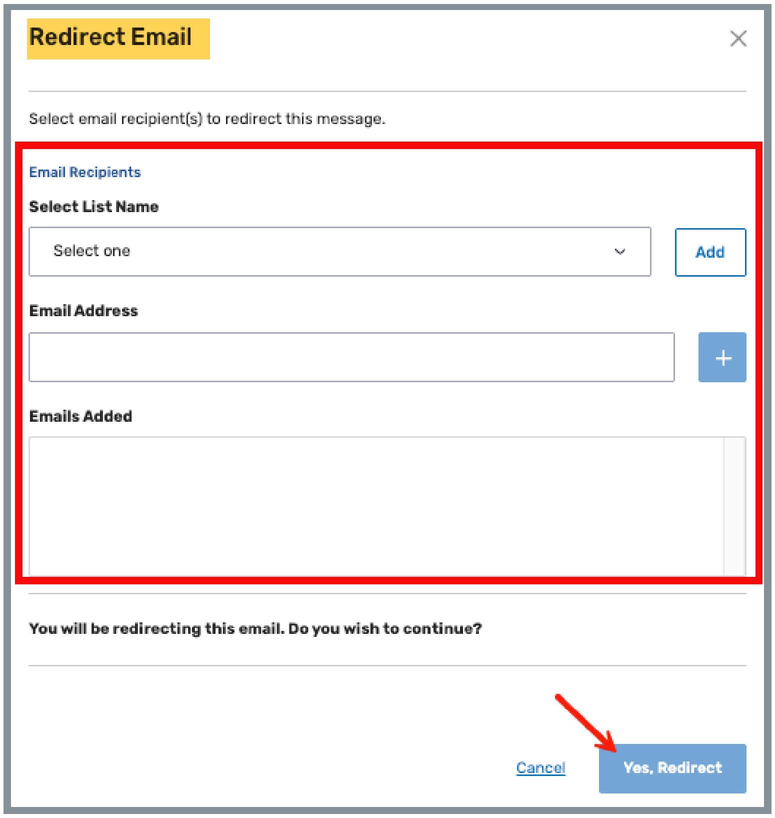

Figure 26: Redirect Email Pop-Up Window

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.

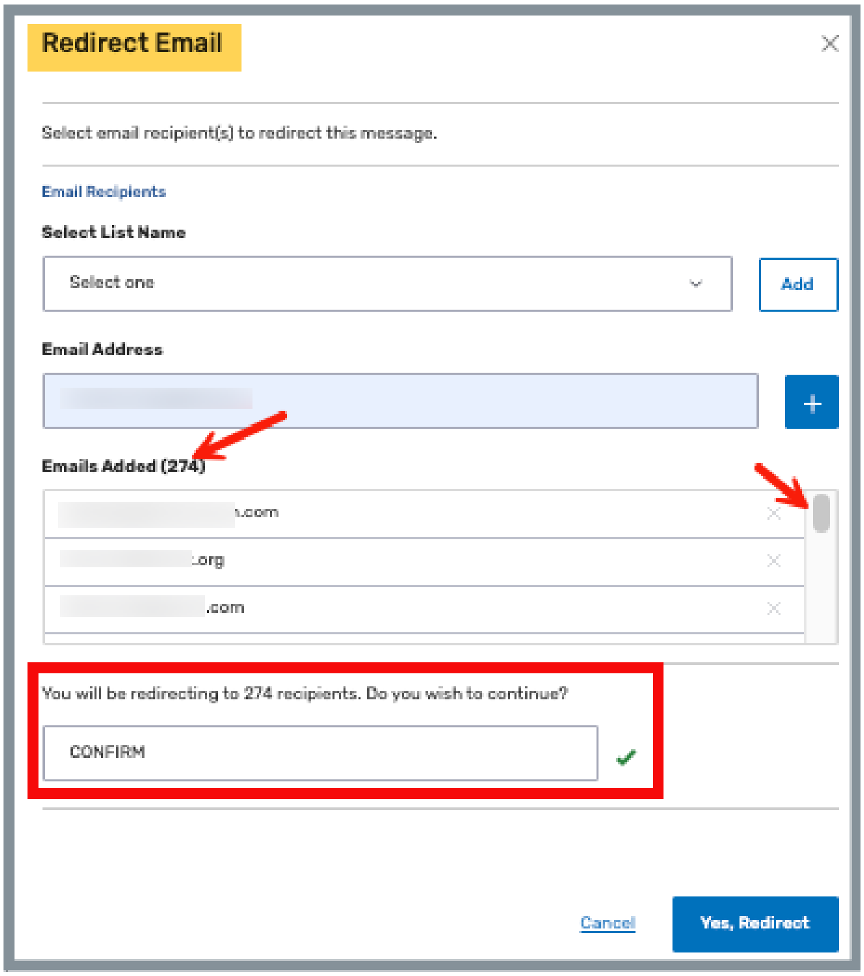

Figure 27: Completed Redirect Email

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*.

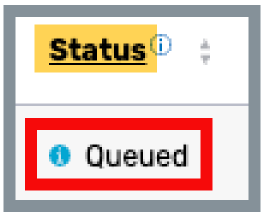

Figure 29: Queued Status

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*.

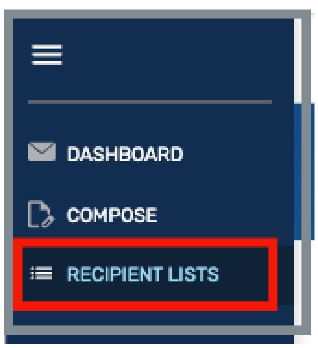

Figure 30: Recipient Lists Left Menu

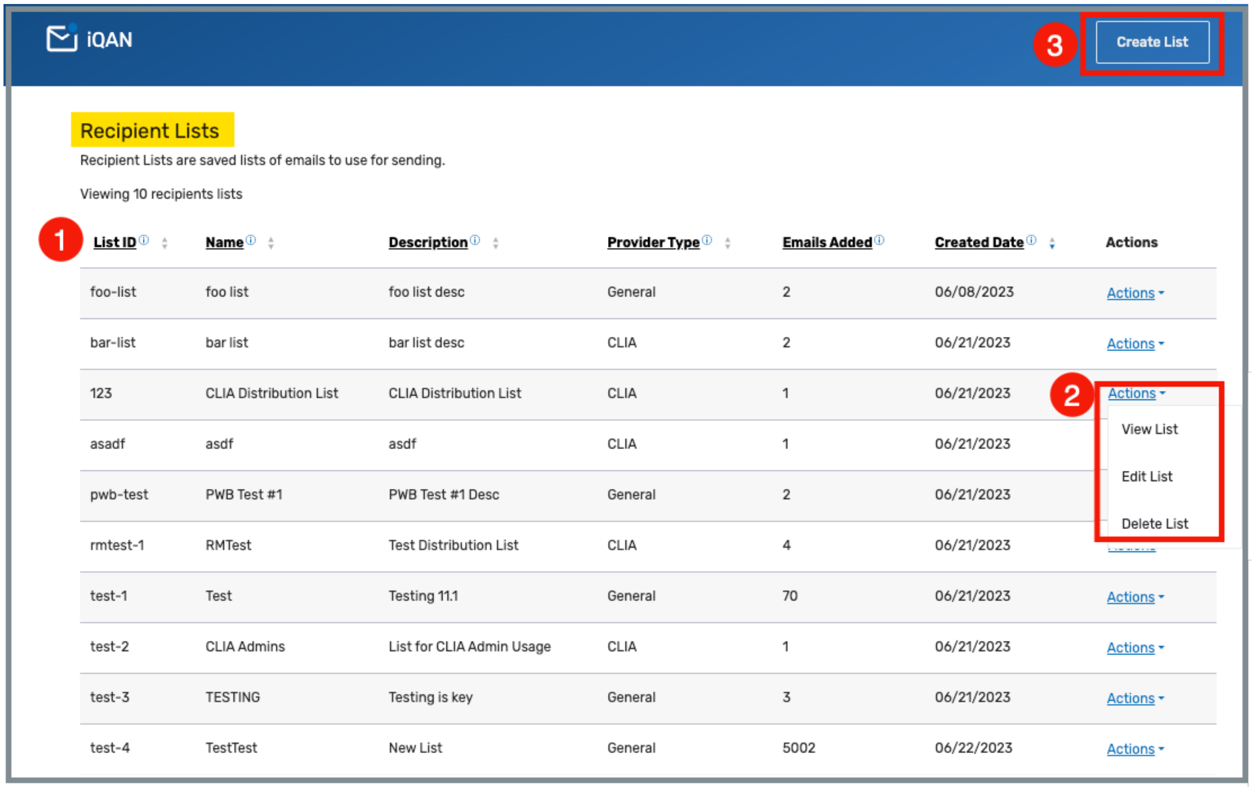

Figure 31: Recipients Lists Callouts

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. • **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.*

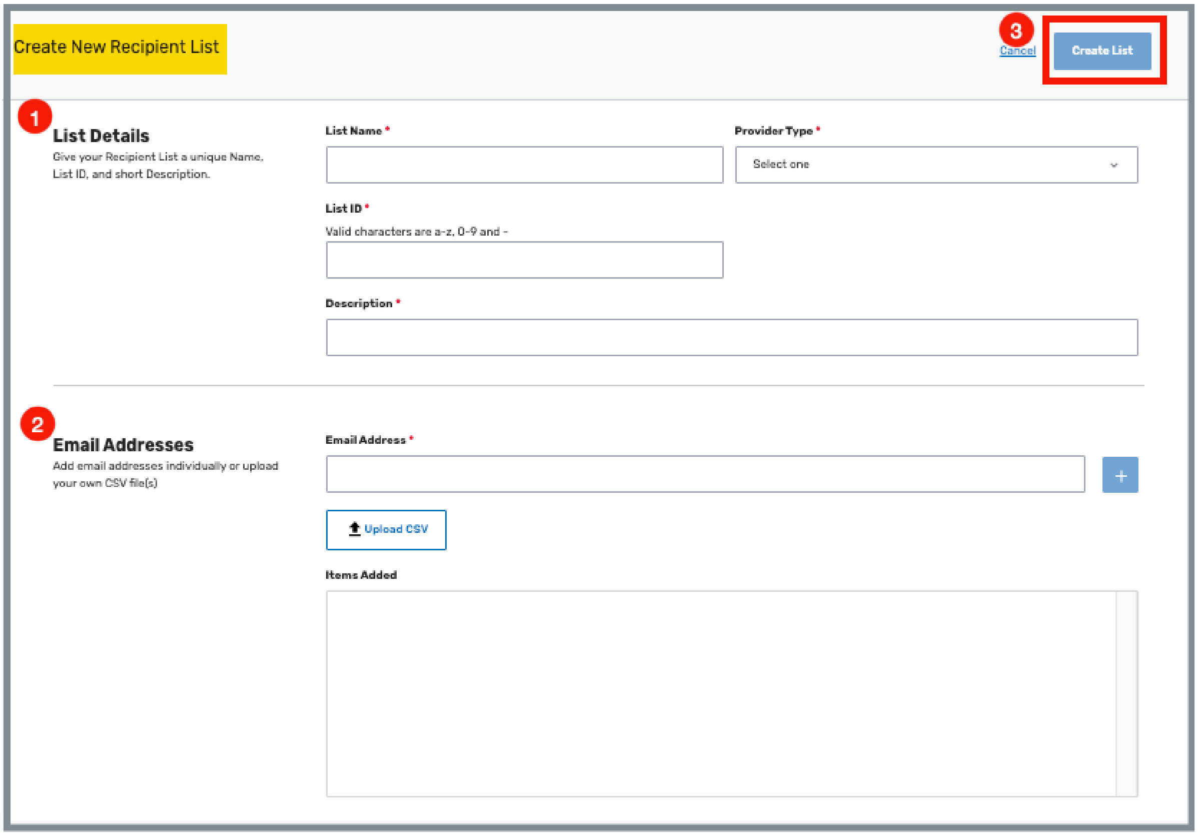

Figure 32: Create New Recipient List

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	**List Name** The name of the list **Provider Type** Select from drop-down menu, if possible. The selection may be automatic, depending on the user role. **List ID** Create a unique list ID using letters and numbers, but no special characters **Notes:** • Characters must be lower case • List IDs must be unique to the provider **Description** Type a description of the list
2	Type each email address, then click **+**. Each email is added to the **Items Added** section. **Notes**: • 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. For example: leonardo@davinci.com,m.lisa@davinci.com
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.*

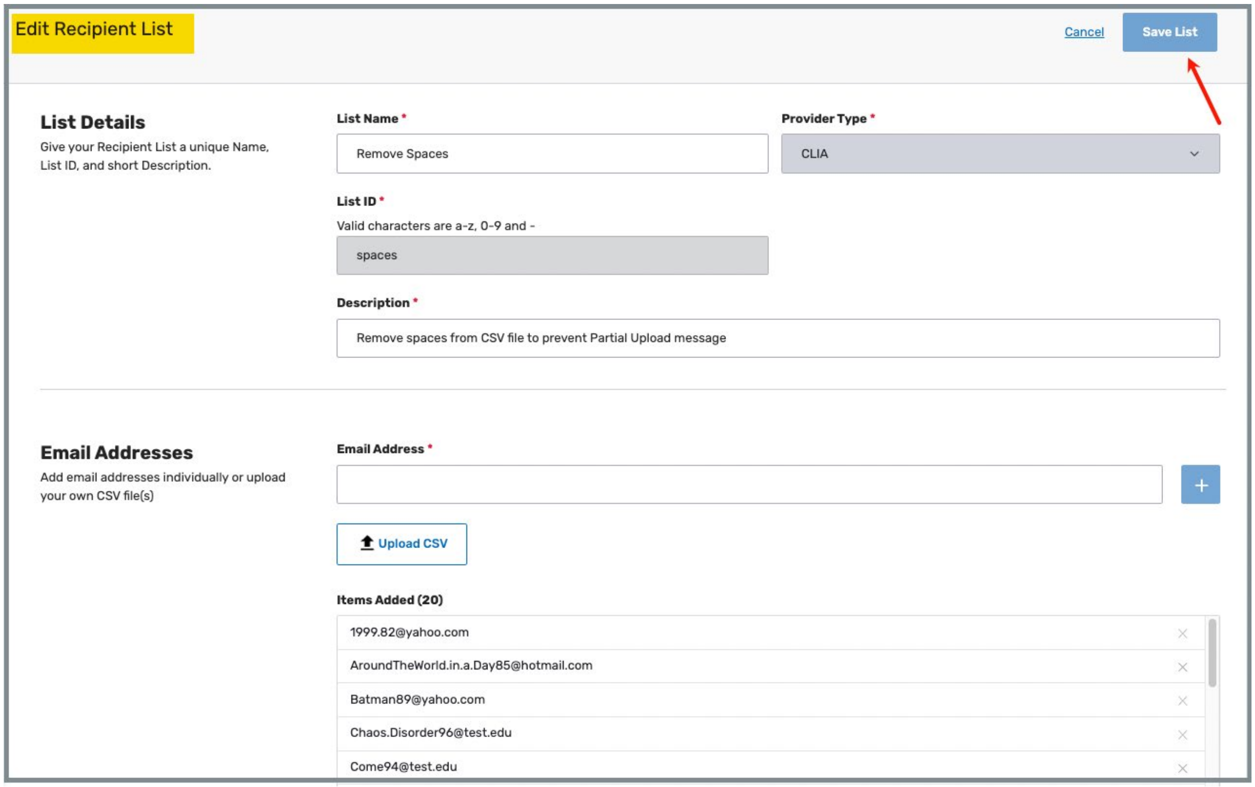

Figure 33: Edit Recipient List Window

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.*

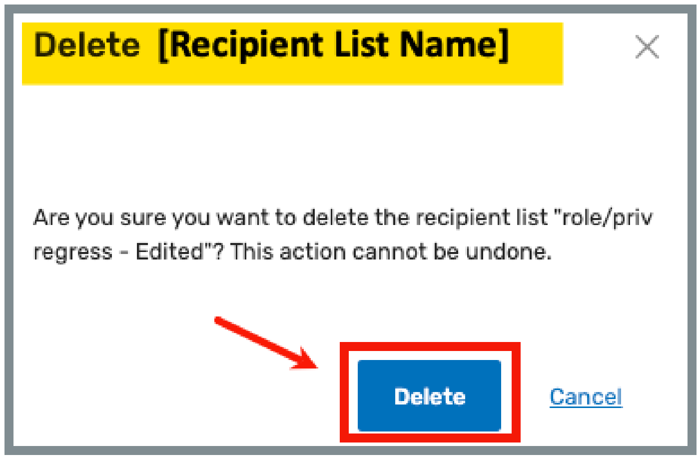

Figure 35: Delete Recipient Pop-Up Window

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.*

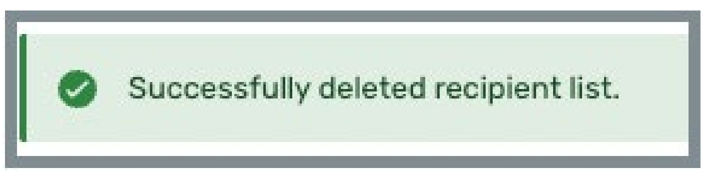

Figure 36: Successfully Deleted Green Notification Banner

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*.

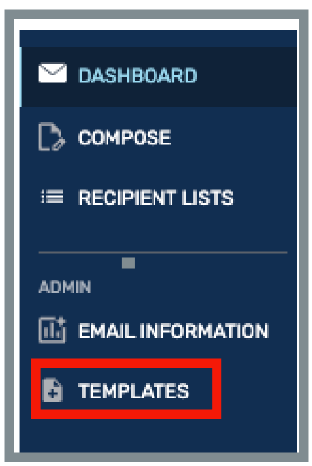

Figure 37: Templates Left Menu

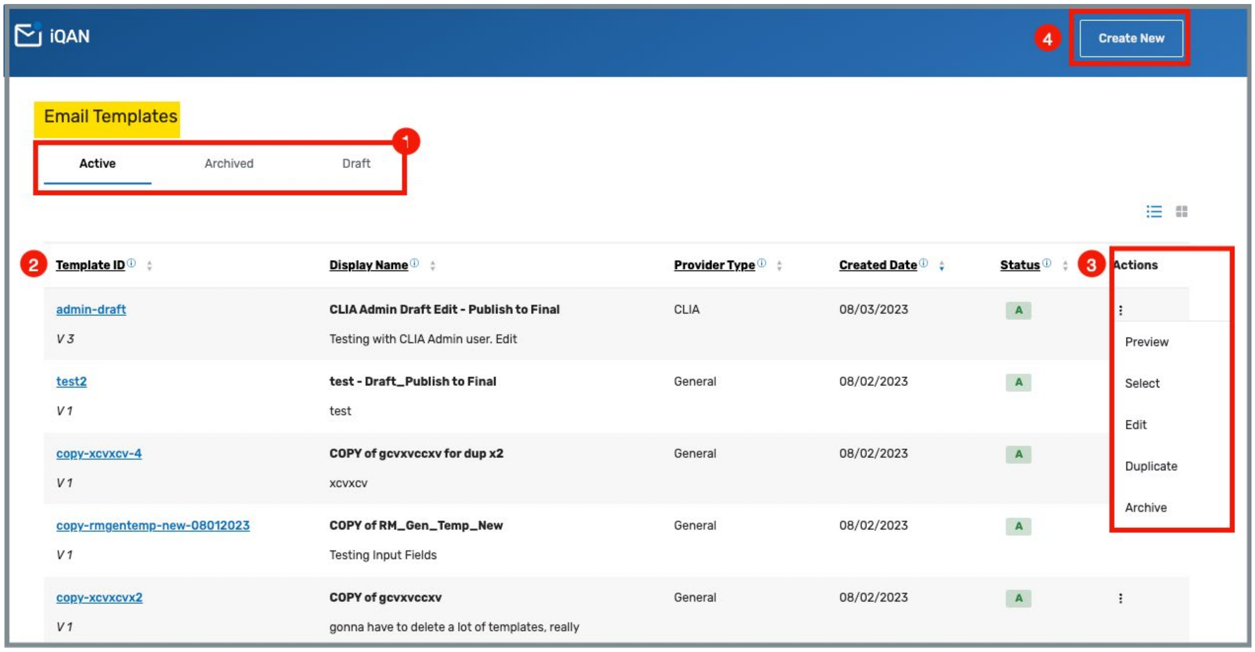

Figure 38: Email Templates Callouts

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.*

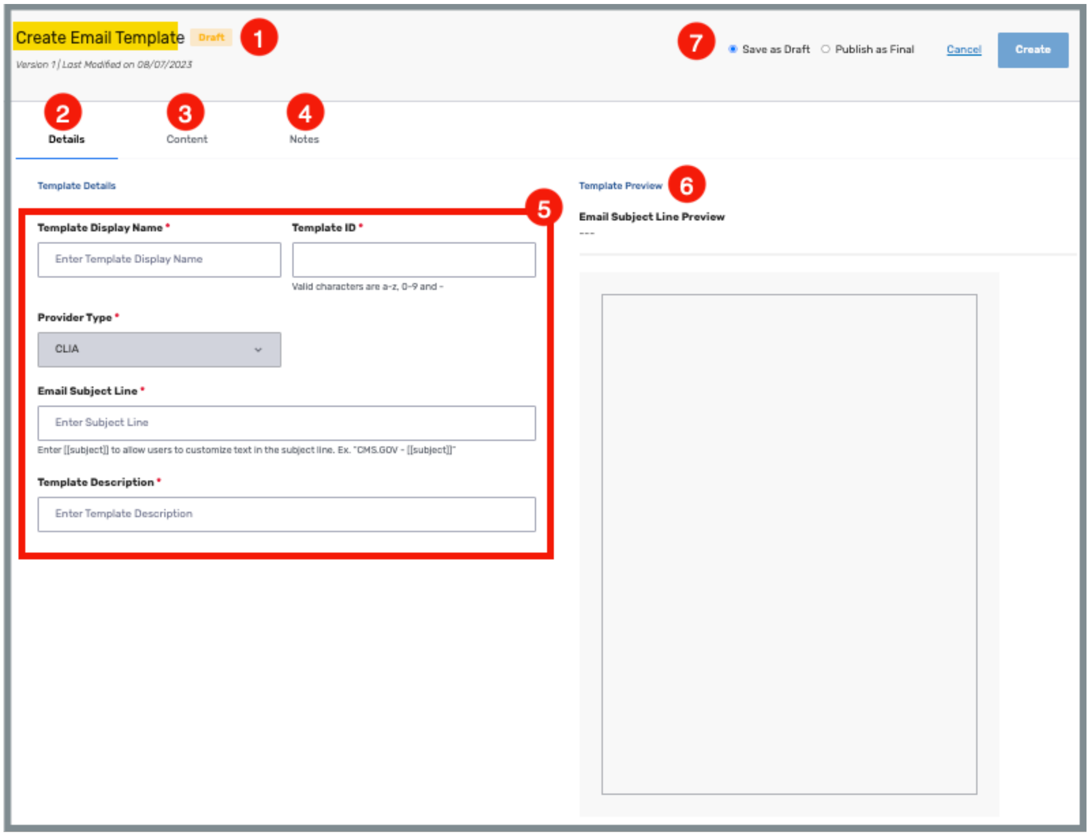

Figure 39: Create Email Template

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	These fields help provide information on the template so it can be easily found. All fields are required. **Notes**: • 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.

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

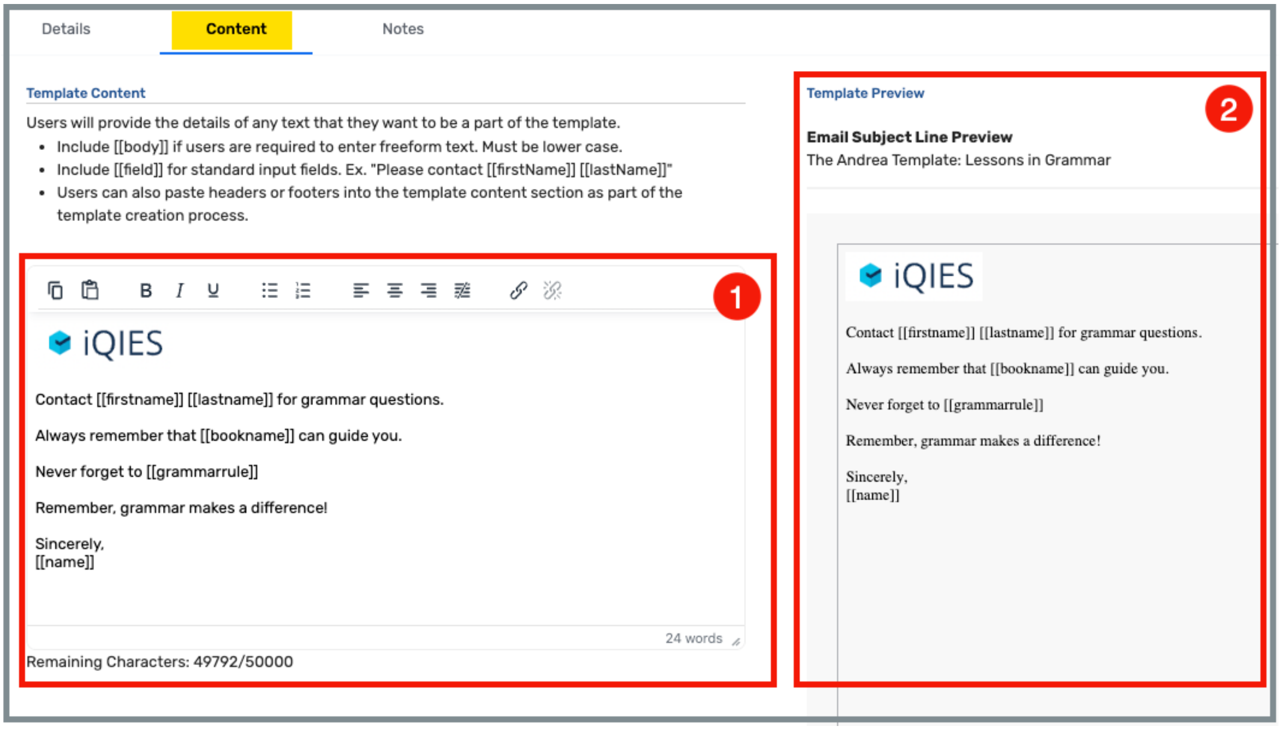

Figure 40: Template Content Tab

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

Table 11: Template Content

Callout	Detailed Explanation

1	• 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 clink 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:
	  ○ 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.

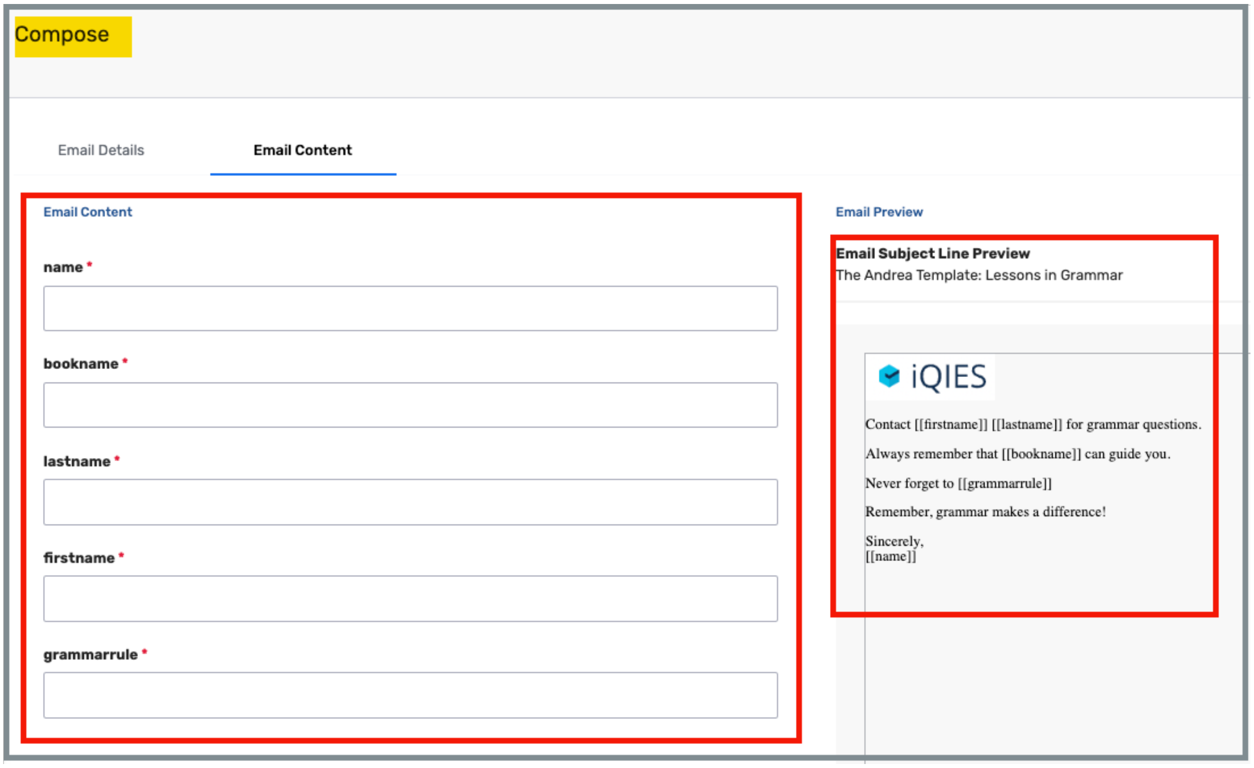

Figure 41: Example of a Completed Template with Fillable Fields

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

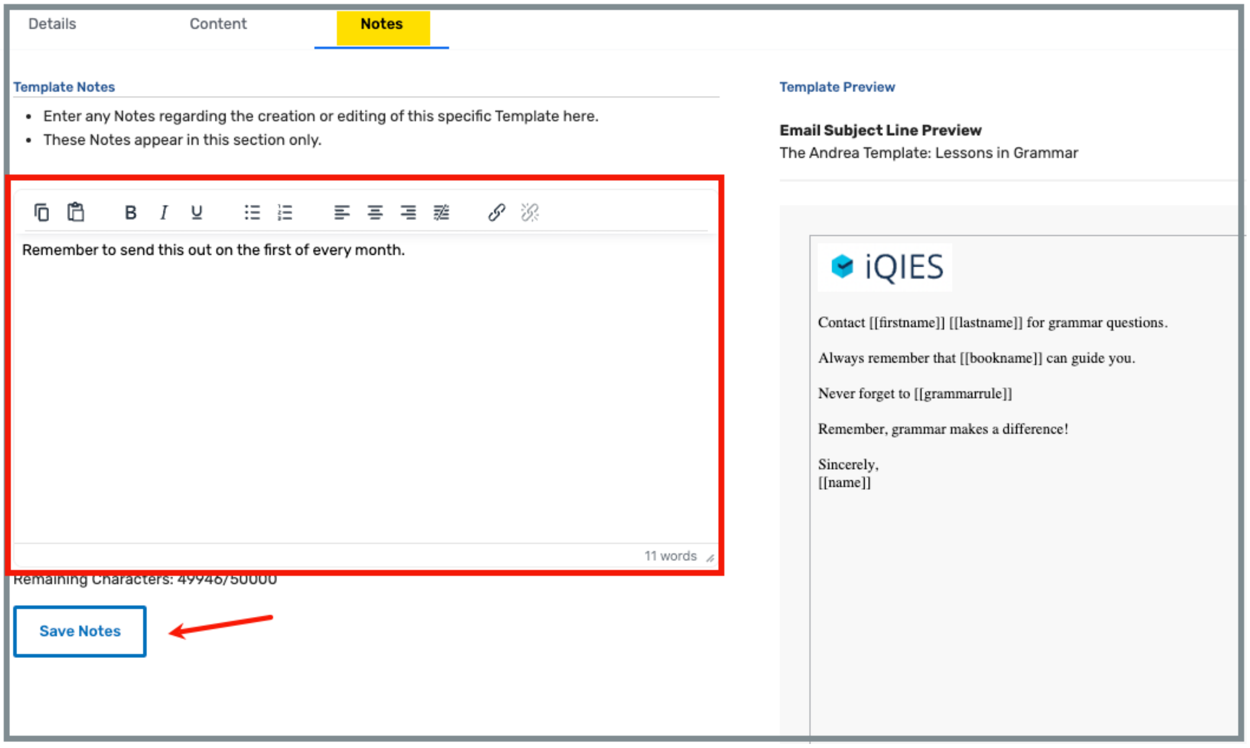

Figure 42: Notes Tab

10.1.8Click **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.*

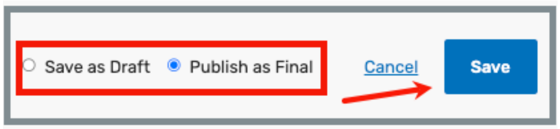

Figure 43: Save

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.

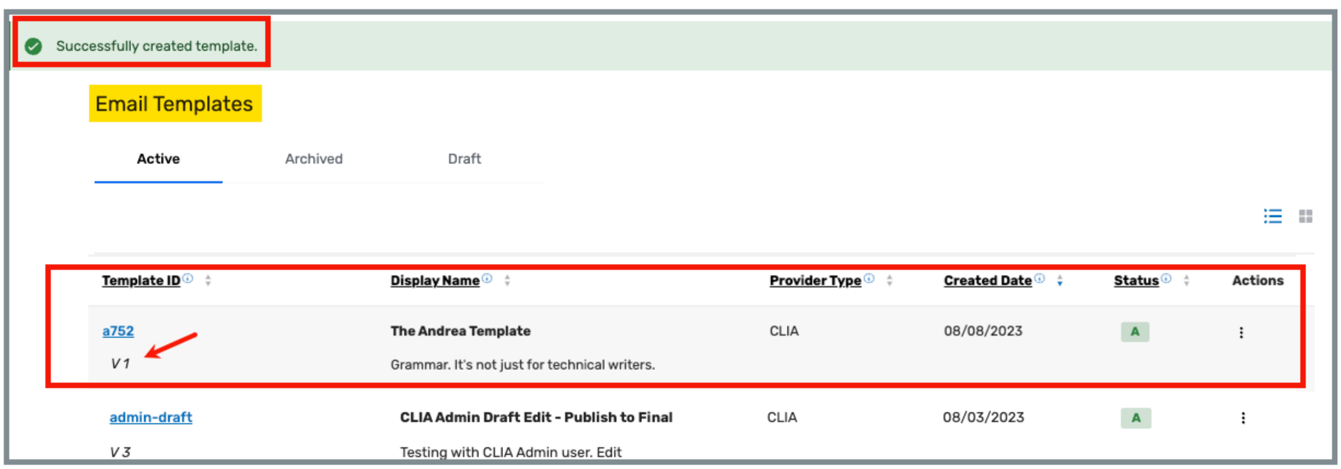

Figure 44: Successfully Created Template

10.3 Edit a Template

10.3.1Select **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.

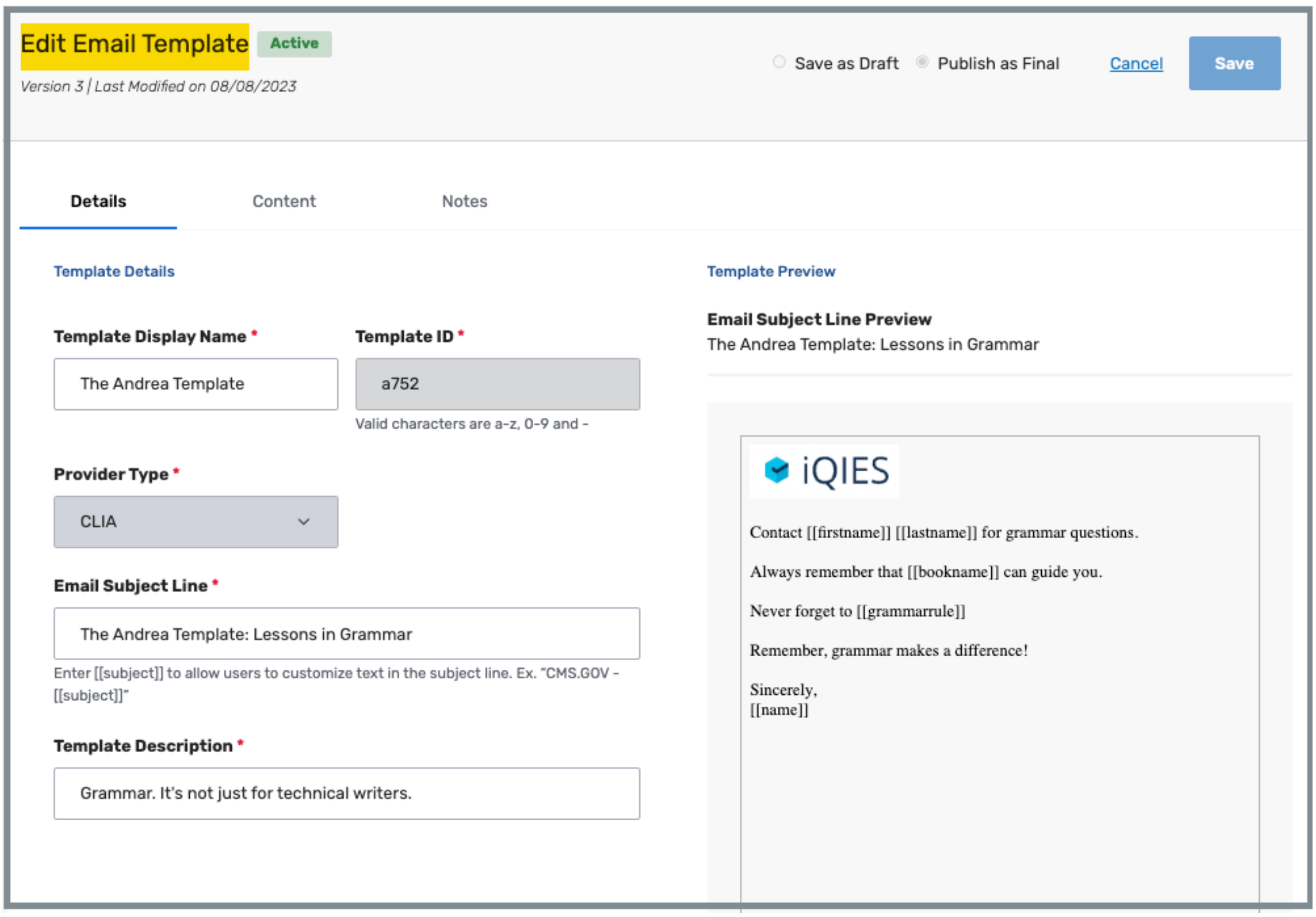

Figure 45: Edit Email Template Window

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.

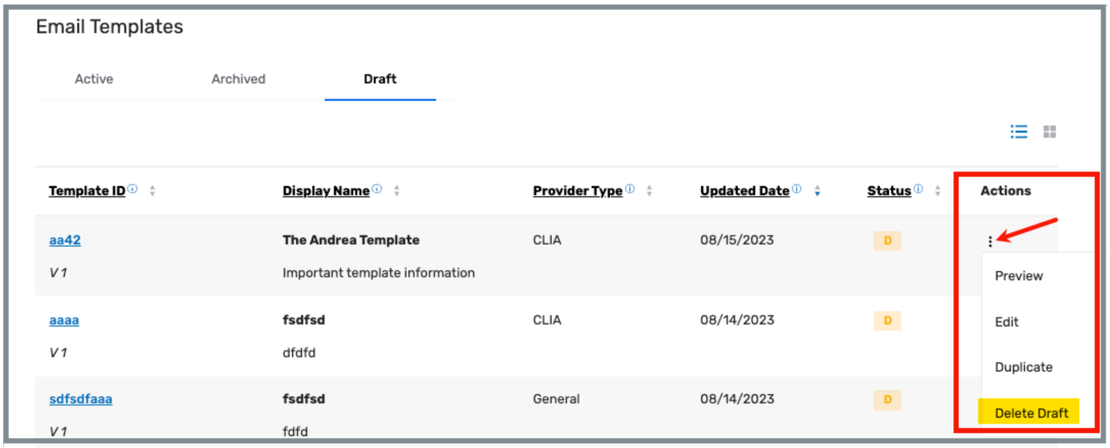

Figure 47: Delete Draft Template Pop-Up Window

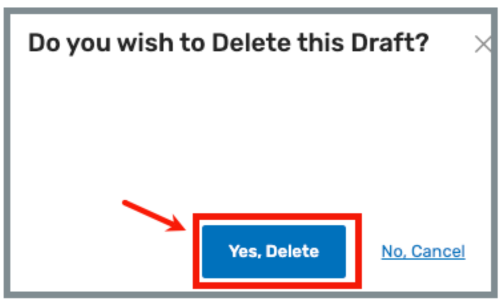

Figure 48: Do You Wish To Delete This Draft?

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.

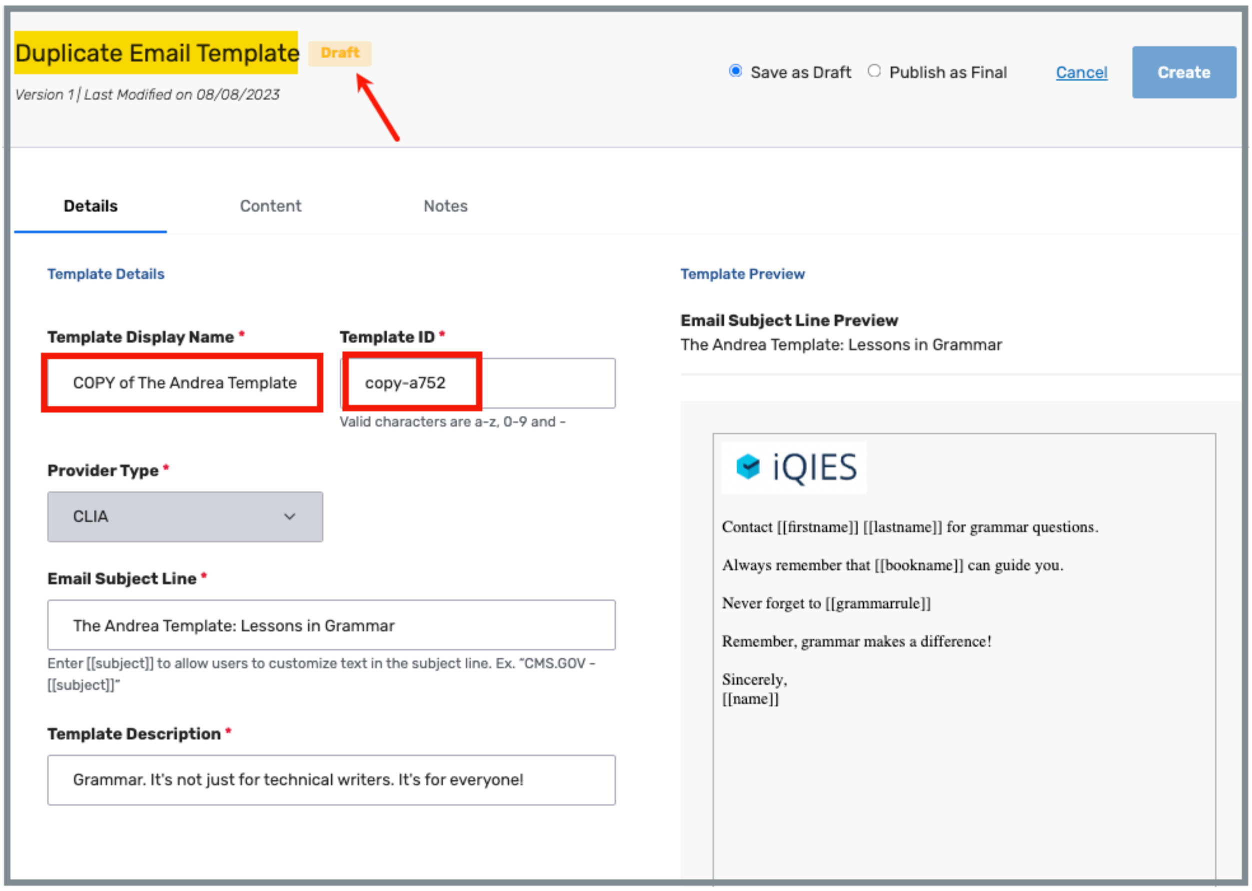

Figure 50: Duplicate Email Template

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

a. The active template is saved in the **Archived** tab as a version of the original template.

b. The template retains its version number in the **Archived** tab. See *Figure 52, Archived Original Template.*

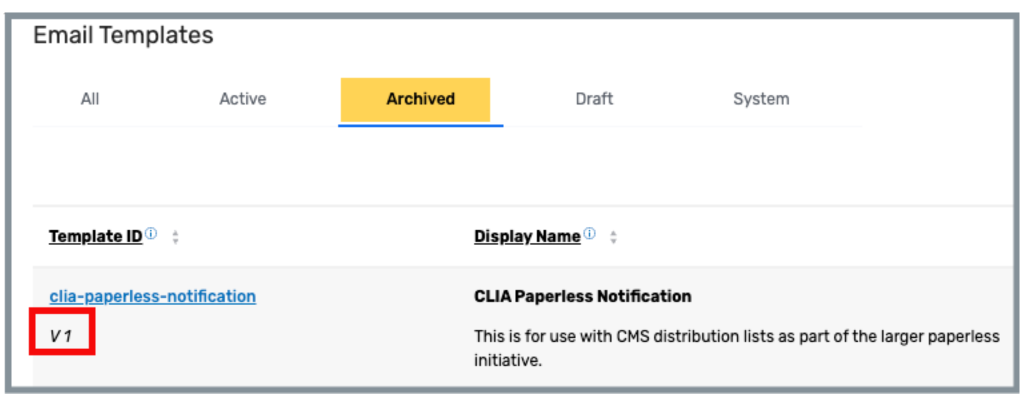

Figure 52: Archived Original Template

10.6.2 Activate a Previous Version of the Template

a. Select the desired version from the **Archived** tab.

b. Reactivating this version moves the current active template to the **Archived** tab with its current version number.

c. The selected version becomes the active template and is displayed as the latest version. See *Figure 53, Updated Active Template.*

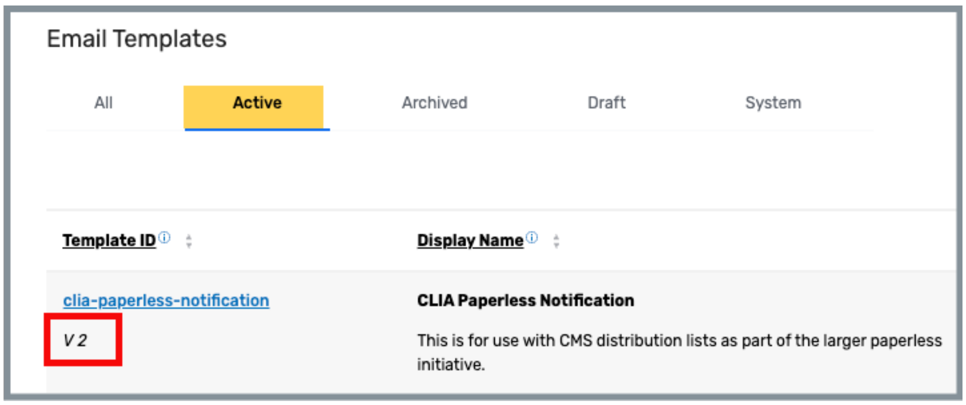

Figure 53: Updated Active Template

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*.

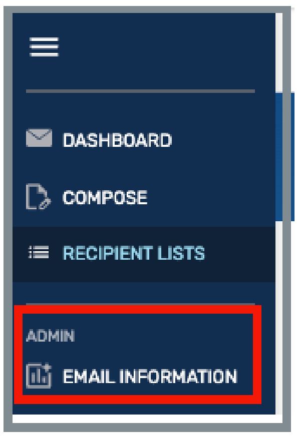

Figure 54: Email Information Left Menu

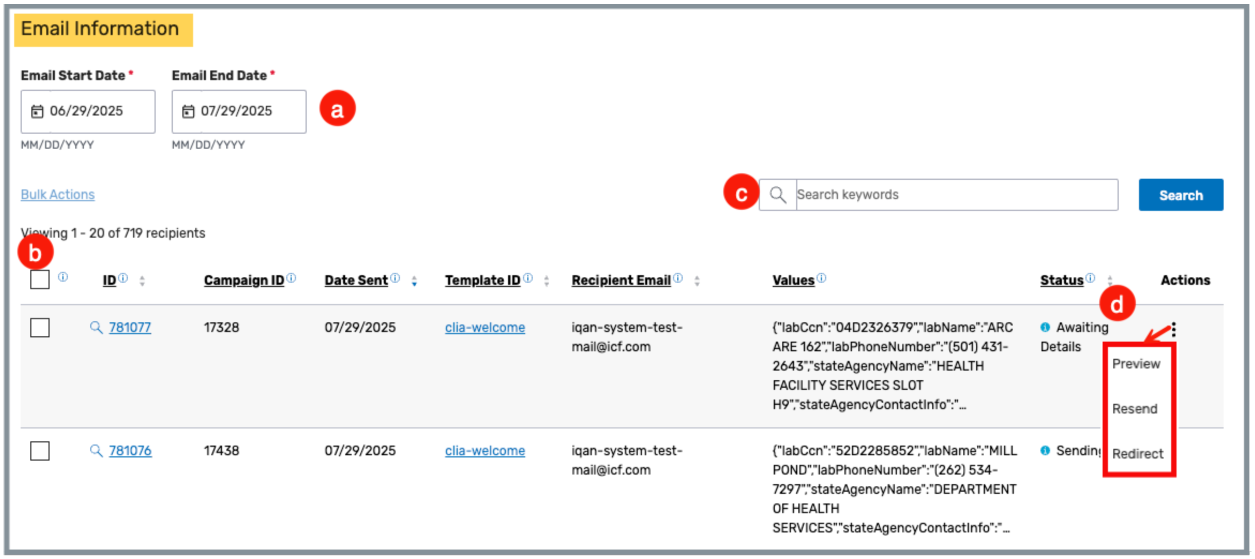

Figure 55: Email Information

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.