



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Accrediting Organization (AO) Upload User Manual

**Version 1.0
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1. Introduction

This user manual explains how approved Accrediting Organizations (AOs) upload laboratory accreditation and provider data to the Centers for Medicare & Medicaid Services (CMS) through iQIES.

For information on other modules, review the [Reference & Manuals](#) on QTSO.

1.1 Getting Started in Survey & Certification (S&C) – Important Information to Know

Review the following important information before using iQIES.

- Log in to iQIES at <https://iqies.cms.gov/> with Health Care Quality Information Systems (HCQIS) Access Roles and Profile ([HARP](#)) login credentials. Review the [iQIES Onboarding Guides and iQIES Training Environment Access sections](#) for further information, if necessary.
- All screenshots included in this manual contain only test data. Current iQIES screens may differ from the screenshots in the manual.
- Screenshots are dependent on user role and may not be an exact representation.
- Words highlighted in blue are clickable links.
- A red asterisk (*) indicates a required field.
- Blank fields may have a limited number of characters allowed in that field. If so, the character limit is shown on the bottom left. The blank fields may also be expanded. Drag the resize handle in the lower-right corner to enlarge the field. See *Figure 1, Expandable Field*.

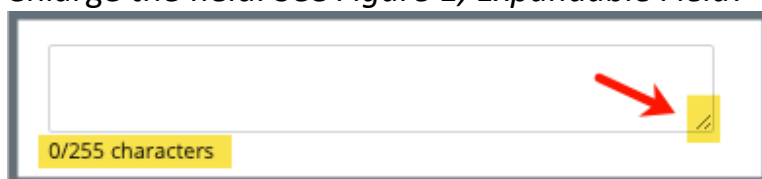


Figure 1: Expandable Field

- 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. Type at least three letters or digits to display matching results. Enter additional characters to narrow the results, then select the applicable result.
- 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 at any time.

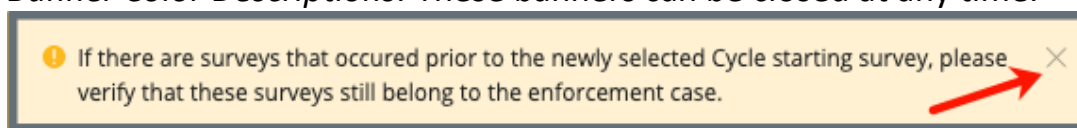


Figure 2: Notification Banner

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 that must be taken.

- Review any tooltips for additional information to perform an action. Hover over the **i** icon to see the tip. Tooltips provide additional information in iQIES. Look for the information icon. See *Figure 3, Tooltip Icon*.

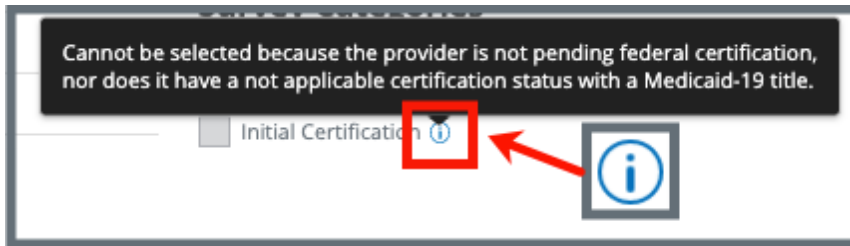


Figure 3: Tooltip Icon

- Below are the supported browsers for access to iQIES. Be sure to keep your browser updated.

[Chrome](#)

[Edge](#)

1.2 iQIES Service Center

The iQIES Service Center supports users working within the various iQIES components: S&C, Patient Assessment, and Reporting.

Assistance Accessing iQIES: Contact the iQIES Security Official (SO) for your organization

Technical Support: Contact the iQIES Service Center:

Phone: 888-477-7876 (select Option 1)

Email: iQIES@cms.hhs.gov

Idea Portal: Feedback for future iQIES software development: [CCSQ Support Central](#). Click **Idea Portals**.

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 facilities
- Assessment Management User Manual
- Quick Reference Guides
- Onboarding Guide
- Managing User Information
- Other helpful iQIES material

iQIES training materials on QSEP include S&C Foundation Series Videos.

1.3 Roles and Permissions

iQIES roles allow users to access information pertinent to their area of work. The examples in this document pertain to S&C and require an AO user role.

Note: Users with the CMS General User role can view only the **Upload History** tab.

Permissions are ultimately governed by HARP access privileges. Contact the AOSO for your organization or the iQIES Service Center for issues relating to access and permissions. Review the [iQIES User Roles Matrix](#) for detailed information on roles.

For additional help, review the iQIES online help <https://iqies.cms.gov/iqies/help> or, once logged into iQIES, click the help icon in the upper-right corner of the screen. See *Figure 4, Help Icon*.



Figure 4: Help Icon

2. AO Upload Management

Select **AO Upload Management** from the top menu in iQIES. See *Figure 5, AO Upload Management Selection*. The **AO Upload Management** page opens. See *Figure 6, AO Upload Management Landing Page* and *Table 2, AO Upload Management Detailed Callout* for a description of the landing page and its components.

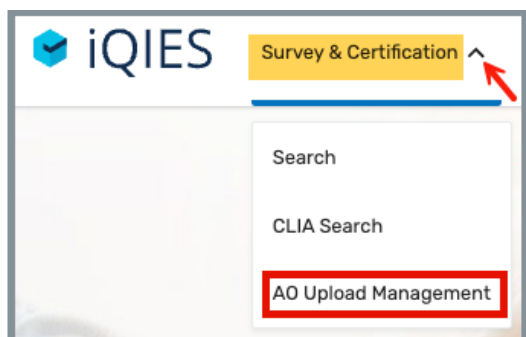


Figure 5: AO Upload Management Selection

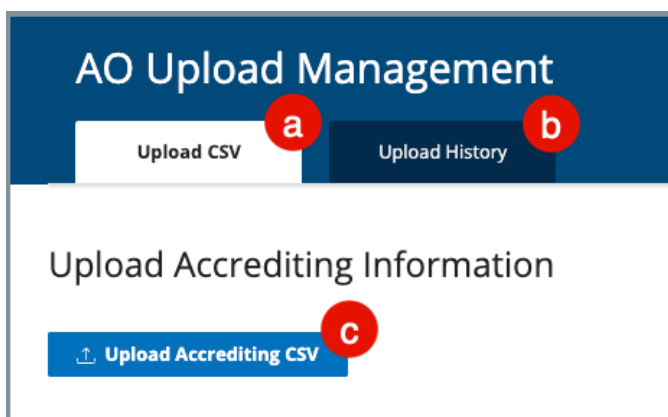


Figure 6: AO Upload Management Landing Page

Table 2: AO Upload Management Detailed Callout

No.	Name	Description
a	Upload CSV tab	Landing page and default tab. The Upload Accrediting CSV link is located on this tab.
b	Upload History tab	Click to view the upload history. Review Upload History .
c	Upload Accrediting CSV	Click to upload a file. Review Upload Accrediting Information .

3. Upload Accrediting Information

Purpose: Upload a valid AO Upload CSV file for AO provider accrediting information.

1. Click **Upload Accrediting CSV**. The file finder opens.
2. Select a valid CSV file to upload. See *Figure 7, Valid CSV file*.

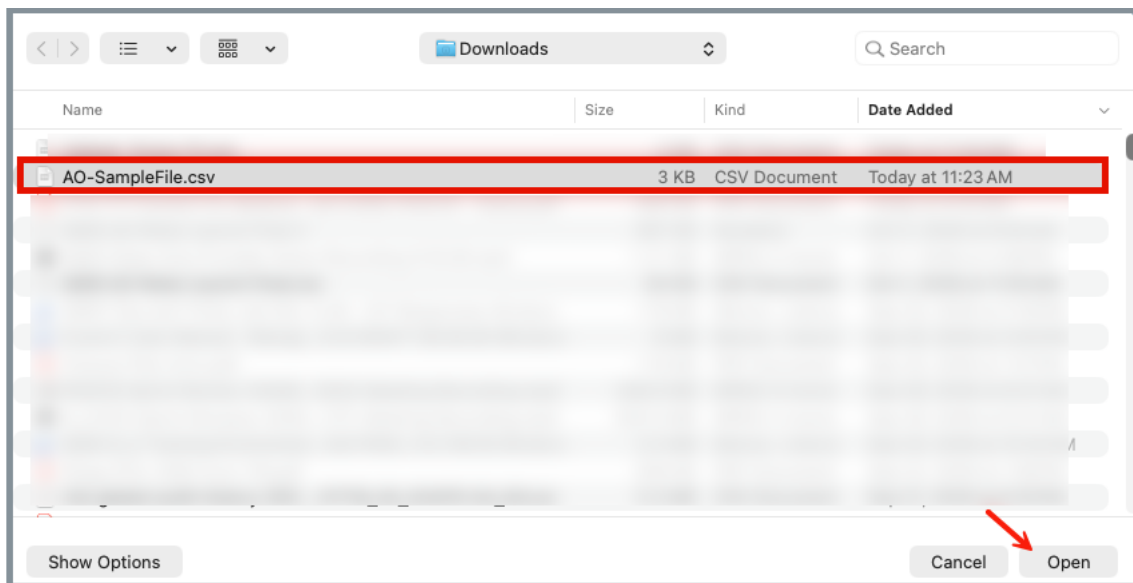


Figure 7: Valid CSV file

3. Click **Open** to upload the file.

Note: **Open** is disabled until a file is selected.

4. Verify the green notification banner appears stating the file upload was successful. See *Figure 8, Upload Successful Green Banner Notification*.

Important Note: **Upload Successful** confirms receipt of the file by iQIES. Check the validation results to verify that the file passed validation.

Note: The **Upload Successful** green banner notification appears on the **Upload CSV** tab.

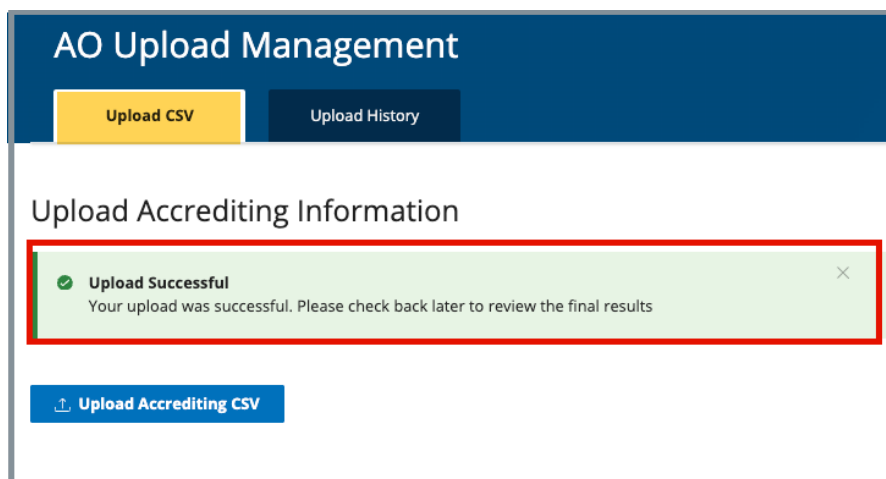


Figure 8: Upload Successful Green Banner Notification

Note: If the file format is invalid, a red **Upload Failed** notification appears. Correct the file and upload it again. See *Figure 9, Upload Failed Notification Banner*.

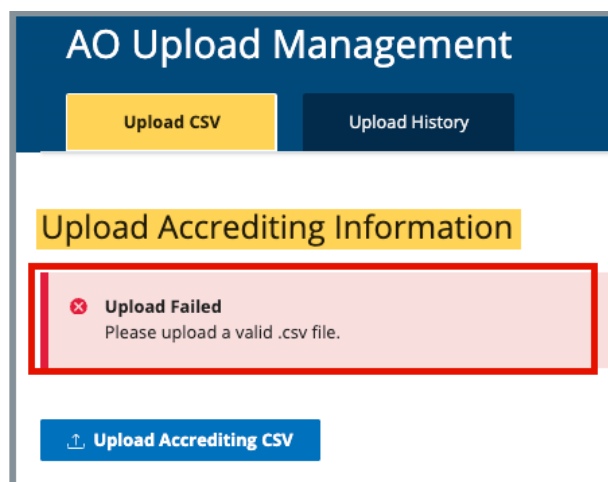


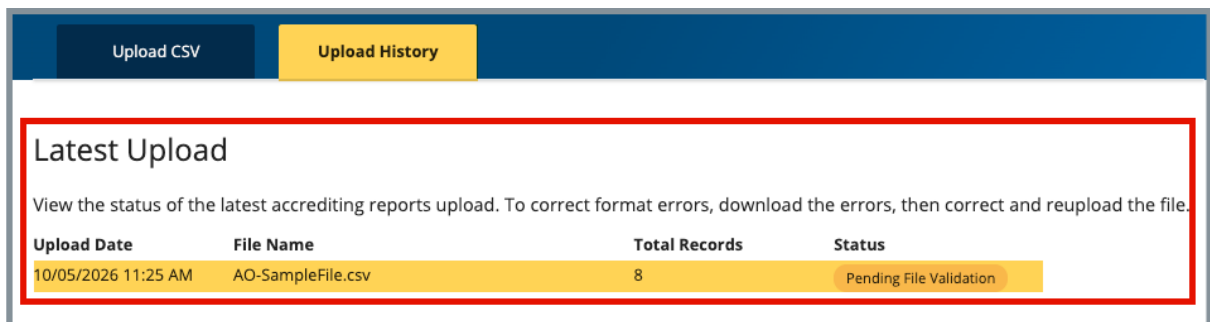
Figure 9: Upload Failed Notification Banner

4. Latest Upload

Purpose: View the details and validation status of the most recent upload.

- 4.1 Click **Upload History** tab. The **Latest Upload/Upload History** page opens.
- 4.2 Review the most recent upload under **Latest Upload**. The section displays the **Upload Date**, **File Name**, **Total Records** in the file, and the file Status. See *Figure 9, Latest Upload*.

Note: A successful upload does not mean file validation is complete. Review the status to determine whether the file is **Pending File Validation**, **Success**, or **File Formatting Errors**.



Upload Date	File Name	Total Records	Status
10/05/2026 11:25 AM	AO-SampleFile.csv	8	Pending File Validation

Figure 10: Latest Upload

5. View Upload History

Purpose: View previous uploads, filter uploads by date, and download original or results files.

Click **Upload History** tab. The **Latest Upload/Upload History** page opens. See *Figure 10, Upload History and Table 3, Upload History Detailed Callout*.

Upload History

View upload history to identify records with matching or format errors.

▼ Hide Filters

Upload Date

Begin date End date

MM/DD/YYYY MM/DD/YYYY

Search

1 - 20 of 6694 Uploads

Upload Date	File Name	Total Records	Original	Status	Results
09/18/2026 9:05 PM	3018.csv	3	File Content	Success	Not Available
09/18/2026 4:48 PM	3018.csv	3	File Content	Success	Not Available
09/18/2026 4:40 PM	base.csv	1	File Content	File Formatting Errors	File Results

Figure 11: Upload History

Table 3: Upload History Detailed Callout

No.	Name	Description
a	Upload History	Displays previous file uploads
b	Show/Hide Filters	Click to show or hide Upload Date filters
c	Upload Date	Type a Begin date , End date , or both
d	Search	Click to search by the entered date or date range
e	Upload Date	Displays the date and time the file was uploaded
f	File Name	Displays the uploaded file name
g	Total Records	Displays the total number of records in the file
h	Original	Click File Content to download the originally uploaded file
i	Status	Displays current status of the uploaded file. Statuses are: File Formatting Errors, Pending File Validation, or Success. Notes: • Correct files with a File Formatting Errors status and upload them again • The Pending File Validation status appears only under Latest Upload
j	Results	Click File Results to download the file formatting errors