



# iQIES Survey & Certification Job Aid

## Letter Template Management

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### Overview

This document explains how to search for a letter template, create a new template, duplicate, archive and reinstate an archived template.

iQIES roles allow users to access information pertinent to their area of work. The examples provided in this document pertain to Survey and Certification (S&C) and require a **State Agency S&C General User** role and a **Letters Administrator** role or for CMS staff, a Centers for Medicare & Medicaid Services (CMS) General User role.

A letter template provides standardized format and content for correspondence to customers.

- There are two types of templates: **Standardized** and **Nonstandardized**.
- There are four template types: **Provider, Survey, Intake, Enforcement**.
- Letters are attached to the record in the specific provider, survey, intake, or enforcement.
- Templates cannot be shared across types (provider, survey, intake, enforcement).
- Batch letters are not currently supported.

Refer to the [S&C User Manual: Letter Template Management](#) for more detailed information on letter templates.

### Search for a Letter Template

1. Go to **Administration** on the top menu.
2. Select **Letter Template Management** from the dropdown menu. The **Template Library** page opens.
3. Type template name or any keyword into search box.
4. Click **Search**. A list of templates appears below.
5. Click **Show Advanced Search**, if desired, to open the **Advanced Search** drop-down menu and narrow the search criteria.
6. Type in desired detailed criteria.
7. Click **Search**. The templates show below.

# New Template Field Descriptions

Template Field	Description
<b>ID</b>	A unique ID that is selected for templates. The system gives the template a random 4-digit/letter ID, but that ID can be changed, if desired.
<b>Template Name</b>	Type the name of the template
<b>Standardized Template</b>	Click the box next to <b>Standardized Template</b> to create a template that cannot be changed when generating a letter. Textholders may be updated, but other content cannot be changed. The template can be edited in the <b>Letter Template Management</b> section.
<b>Nonstandardized Template</b>	The <b>Nonstandardized Template</b> can be edited when generating a letter. This is the default template when creating a new template.
<b>Description</b>	Type a brief description of the template so it can be easily found during a search
<b>Marginal Type</b>	Select the type of template. Selections vary depending on choice.
<b>Content</b>	This template is used for the body of a letter. The following fields appear when <b>Content</b> is selected: <b>Template Type, Header, Footer</b>
<b>Header/Footer</b>	This template is either just a header or just a footer. It can be added to content templates to create other templates.  Both the header and footer are created at the top of the page. They will appear correctly when added to a letter template.
<b>Template Type</b>	Select from <b>Provider, Survey, Intake, or Enforcement.</b> <b>Template Type</b> cannot be edited after the template is saved.
<b>Provider Type</b>	<b>All</b> is the default selection. Delete <b>All</b> to view the drop-down menu of individual selections. <b>Provider Type</b> cannot be edited after the template is saved.
<b>State</b>	A drop-down menu appears if user has access to more than one state. The state cannot be edited after the template is saved. Duplicate the letter to create a letter for more than one state.

## Create a New Template

1. Click **Create New Template** on top right of window. The **Create a new template** pop-up window opens.
2. Fill in the fields.
3. Click **Save**. The newly created letter template opens.

## Duplicate a Template

1. Open the desired template to duplicate.
2. Select **Duplicate** from the **More Actions** drop-down menu.
3. Rename the template.
4. Update the fields as needed.
5. Click **Save**. The **Letter Template Management** page opens and the letter can be edited.
6. Click **Save** to save the template as a draft.
7. Click **Publish** to publish the template.

## Archive a Template

**Note:** Templates cannot be deleted. Archived templates can be reinstated for use if needed.

1. Open the desired template to archive.
2. Select **Archive** from the **More Actions** drop-down menu. The **Are you sure?** window pops up.
3. Click **Yes, archive**. The **Letter Template Archived Notification** opens.

## Reinstate an Archived Template

1. Go to the **Template Library**. Click **Show Advanced Search**.
2. Click **Archived** under **Status**.
3. Click **Search**.
4. Select the template to be reinstated.
5. Select **Publish** or **Return as draft** (if additional edits are needed) from the drop-down menu under **More Actions**.

## Additional Resources

<b>Assistance Accessing iQIES:</b>	Contact the iQIES Security Official (SO) for your organization
<b>Technical Support:</b>	Contact the iQIES Service Center:
<b>Phone:</b>	888-477-7876 (select Option 1)
<b>Email:</b>	iQIES@cms.hhs.gov
<b>CCSQ Support Central:</b>	Create a new ticket or track an existing ticket: <a href="https://cmsqualitysupport.servicenowservices.com/ccsq_support_central">https://cmsqualitysupport.servicenowservices.com/ccsq_support_central</a>
<b>Idea Portal:</b>	Feedback for future iQIES software development: <a href="#">CCSQ Support Central</a> . Click <b>Idea Portals</b> .
<b>More information on iQIES:</b>	Refer to the <a href="#">QIES Technical Support Office</a> (QTSO) and the <a href="#">Quality, Safety, &amp; Education Portal</a> (QSEP). Logging in to HARP may be required before accessing some documentation in QTSO and QSEP.