



# iQIES Survey & Certification Job Aid Letter Template Management (LTM)

## Overview

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

LTM requires a State Agency S&C General User role and a Letters Administrator role or for CMS staff, a CMS role.

## Notes

- Templates cannot be shared across types (provider, survey, intake, enforcement).
- Textholders can be shared across types.
- Batch letters are not currently supported.
- Letters are attached to the record in the specific provider, survey, intake, or enforcement. Review [Letters, Notes, Attachments User Manual](#) for details on how to upload letters or generate letters from a template.
- Review the [Letter Template Management User Manual](#) for detailed instructions on LTM, including screenshots or review the LTM video on QSEP

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## LTM Location

Letter Template Management can be found on the top menu under the Administration drop-down.

## Search for a Letter Template

**Note:** Templates are associated with either a provider, survey, intake, or enforcement as they are dependent on the data in those records.

1. Type template name or any keyword into search box.
2. Click **Search**. A list of templates appears below.
3. Type in desired detailed criteria. Click **Search**. The templates show below.

## Create a New Template

There are three template types:

### **Nonstandardized State Letter Templates:**

- Reside in iQIES for a specific state
- Can be accessed and changed by any State Agency General User (SAGU) with the appropriate permissions for the specific state

### **Nonstandardized Federal Letter Templates:**

- Can be accessed with the appropriate permissions for a particular state
- Can be changed by any CMS General User (CMSGU).

### **Standardized templates:**

Can be accessed and edited by any user for that state with the appropriate permissions in Letter Template Management.

Note: **Marginal Type, Template Type, and Provider Type** cannot be edited after the template is saved.

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.
4. Click the image icon in the editor to add a logo, if desired. The **Insert/Edit Image** pop-up window opens.
5. Click **Upload**.

**Notes:**

- The default landing is the **General** tab.
  - The **General** tab automatically displays the **Source** location of the image. Do not edit the location as this interferes with the upload process.
  - A logo can be copied and pasted into the letter template.
6. Drag and drop a logo/picture into the **Drop an image here** box or click **Browse for an image** to upload an image from the computer.
  7. Click **Save**.
  8. Create the template in the text box. Put cursor in desired area to add information.
  9. Type the template information or copy and paste from an existing document.

**Note:** Create the template as it is done in any word processing program. Type words, copy text from existing documents and paste in the text box, format the text, etc.

10. Select from **Textholder Bank** for record data to be inserted. Click any textholder to insert it in the document.

**Notes:**

- Textholder data is automatically inserted in the template when the letter is generated for use.
  - Custom textholders can be created with the **Custom Text Prompt** from the Textholder Bank.
  - Textholders from multiple functional areas can be added.
11. Click **Save** to save as a draft.
  12. Click **Publish** to publish template.

**Note:** **Publish** makes the template available for any users in the **Letters** section specific to each of the provider, survey, intake, or enforcement area, i.e., a letter can now be created with the template.

## Edit a Template

1. Click the desired template under **Name** from the **Template Library**. The template opens and can be edited.
2. Click **Edit** to edit template ID, name, description, header, or footer.
3. Update the template as desired.
4. Click **Save** to save as a draft or click **Publish** to publish template.

## Duplicate a Template

1. Select Duplicate from the More Actions drop-down menu. See Figure 1, Duplicate a Template. The Edit Settings pop-up window opens.  
**Note:** Templates can also be duplicated directly from the Template Library. Select Duplicate from the Actions drop-down menu next to the template.
2. Rename the template.
3. Update the fields as needed.
4. Click **Save**. The Letter Template Management page opens and the letter can be edited.
5. Click **Save** to save the template as a draft or click **Publish** to publish the template.

## Archive a Template

### Notes:

- Templates cannot be deleted. Archived templates can be reinstated for use if needed.
- Any user with a Letters Administrator role or a CMS User role can archive a template. Double check any template before archiving.

1. Select Archive from the More Actions drop-down menu. See Figure 2, Archive a Template. The Are you sure? pop-up window opens.

**Note:** Templates can also be archived directly from the **Template Library**. Select **Archive** from the **Actions** drop-down menu next to the template.

2. Click **Yes, archive**.

## Reinstate an Archived Template

1. Go to the Template Library.
2. Click **Show Advanced Search**.
3. Click **Archived** under **Status**.
4. Click **Search**.
5. Open the template to be reinstated.
6. Select **Publish** or **Return as draft** from the drop-down menu under **More Actions**.

## Create a Custom Textholder

1. Open the letter template where the custom textholder needs to be added.
2. Select area in template where desired custom textholder will be inserted.  
**Note:** More than one custom textholder can be added to a letter template.
3. Click **Custom Text Prompt** from Textholder Bank.
4. Edit the User entered prompt in the **Custom Text Prompt** formula with desired data.

**Notes:**

- Do not remove the quotation marks in the **Custom Text Prompt** formula.
  - The **Custom Text Prompt** appears as an editable formula in the body of the letter.
5. Click **Save** to save template.