



## **Centers for Medicare & Medicaid Services**

# **Internet Quality Improvement Evaluation System (iQIES)**

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## **Survey and Certification (S&C): Letter Template Management Job Aid**

**Version 1.0  
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# 1. Letter Template Management Overview

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This Letter Template Management Overview shows how to create, edit, and use letter templates.

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

Be aware that letters are attached to the record in the specific Provider, Survey, Intake, or Enforcement. Review **Manage a Survey**, **Manage a Provider**, **Manage an Intake**, or **Manage an Enforcement** sections in the S&C User Manual for specific details, if needed.

## 2. Letter Template Management Location

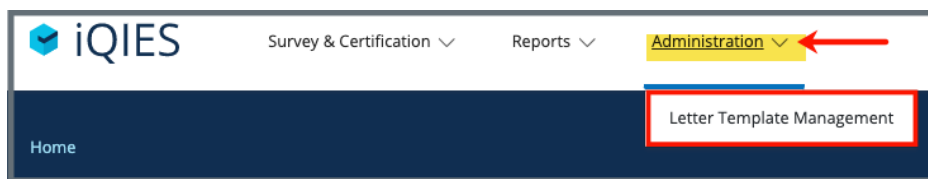
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2.1 Go to **Administration** on the top menu.

2.2 Click the arrow and select **Letter Template Management** from the drop-down menu. *See Figure 1, Letter Template Drop-Down.* The **Template Library** page opens with a list of templates that have already been created.

**Note:** There are four template types: **Provider**, **Survey**, **Intake**, **Enforcement**.

**Note:** Templates are associated with either a Provider, Survey, Intake, or Enforcement as they are dependent on the data in those records.

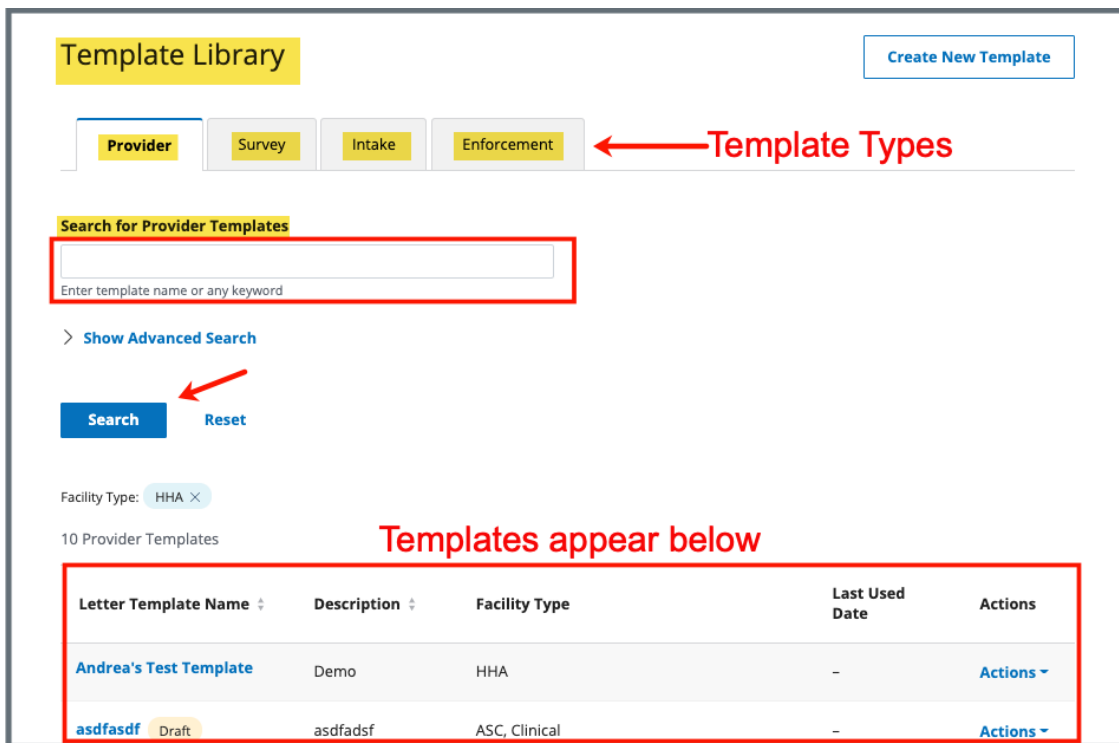


**Figure 1: Letter Template Drop-Down**

### 3. Search for a Letter Template

**Note:** The examples shown below are for the Provider Templates. All four **Template Libraries** are set up the same way. Be sure to look on the tab that corresponds to the template needed.

- 3.1 Type template name or any key word into search box. See *Figure 2, Search for a Template*.
- 3.2 Click **Search**. A list of templates appears below.



**Figure 2: Search for a Template**

**Note:** Template names and descriptions can be sorted by alphabetical or reverse alphabetical order. Click the arrows next to the heading to sort.

**Note:** Click **Show Advanced Search** for a more detailed search. Refer to steps 3.3 and 3.4 below.

- 3.3 Click **Show Advanced Search**, if desired, to open the **Advanced Search** drop-down menu and narrow the search criteria. See *Figure 3, Advanced Search*.
- 3.4 Type in desired detailed criteria. Click **Search**. The templates show below.

**Note:** Click **Hide Advanced Search** to close the **Advanced Search** menu.

Enter template name or any keyword

Hide Advanced Search

FACILITY TYPE

Facility Type

HHA X Select... X

Select one or more

STATUS

Status

Drafts Only

DATES

Last Used Date

Start Date to End Date

MM/DD/YYYY MM/DD/YYYY

Search Reset

**Figure 3: Advanced Search**

## 4. Create a New Template

**Note:** Nonstandardized State Letter Templates reside in iQIES for a specific state and can be accessed and changed by any State Agency General User (SAGU) for the specific state.

**Note:** Nonstandardized Federal Letter Templates can be accessed for a particular state and changed by any CMS General User (CMSGU).

**Note:** Standardized templates can only be accessed and changed by any user for that state in Letter Template Management. See [Attach a Template to a Record](#) for more information.

4.1 Click **Create a New Template**. The **Create a new template** pop-up window opens. See *Figure 4, Create a New Template*.

The screenshot shows a 'Create a new template' dialog box. It includes a title bar with a close button. The main content area contains the following elements: a 'Template Name \*' text input field (highlighted with a red box), a 'Standardized Template' checkbox, a 'Description' text area, a 'Template Type \*' section with radio buttons for 'Provider', 'Survey', 'Intake', and 'Enforcement' (highlighted with a red box), a 'Provider Type \*' dropdown menu, and three dropdown menus for 'State' (set to 'Florida'), 'Management Unit' (set to 'Select one'), and 'Work Unit' (set to 'Select one'). At the bottom, there are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

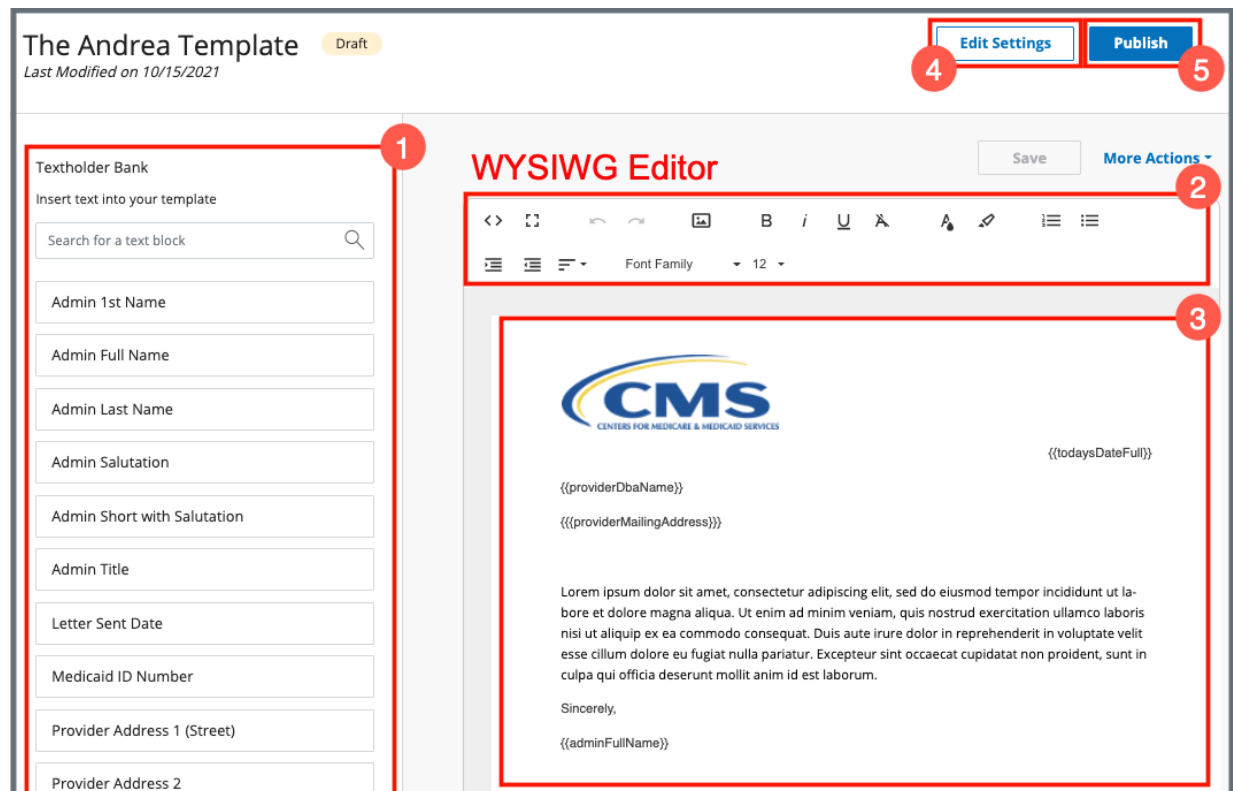
**Figure 4: Create a New Template**

4.2 Fill in the fields.

**Note:** Click the box next to **Standardized Template** to create a template that cannot be changed when generating a letter. Text holders may be updated, but other content cannot be changed. The template can be edited in the **Letter Template Management** section.

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

- 4.3 **Click Save.** The newly-created letter template opens. See *Figure 5, Letter Template Parts Explanation.*

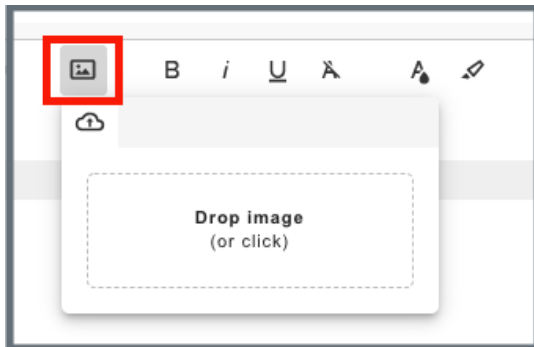


**Figure 5: Letter Template Parts Explanation**

1. **Textholder Bank:** This is a list of all the text fields that can be added to the letter template. Each textholder is representative of data specific to the Providers, Surveys, Intakes, or Enforcements area. The list is specific to each area and is in alphabetical order. Type the first few letters of desired text in the **Search** box to search for a specific textholder. Textholders for each area are located in Appendix B-E.
2. **WYSIWYG Editor:** (What You See Is What You Get) allows content to be edited, including formatting, bulleting, etc.
3. **Letter Template:** This is the letter template to be created. Add textholders for provider data.

4. **Edit Settings:** Click **Edit Settings** to update template settings. Change **Template Name, Description**, if desired, or make into a **Standardized Template**.
5. **Publish:** Click **Publish** to add to template library.
- 4.4 **Click** the image icon at the top of the template to add a logo, if desired. A **Drop image** screen opens, and the picture/logo can be dragged and dropped in the box. Click **Drop image** to upload an image from the computer. See *Figure 6, Drop Image*.

**Note:** It is also possible to copy and paste a logo into the letter template. The logo can be resized by clicking the logo box and dragging one of the corners.



**Figure 6: Drop Image**

- 4.5 Create the template in the text box. Put cursor where desired to add information. Type the template information.  
**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.
- 4.6 Select from **Textholder Bank** for record data to be inserted. Click any textholder to insert it in the document.  
**Note:** This data is automatically inserted in the template when the letter is generated. See Appendices A-D for a complete list of all textholders for each specific Providers, Surveys, Intakes, or Enforcements area.
- 4.7 **Click Save** to save as a draft.
- 4.8 **Click Publish** to publish template.



**Note: Publish** makes the template available for any users in the **Letters** section specific to each of the Providers, Surveys, Intakes, or Enforcements area, i.e., a letter can now be created with the template. See [Attach a Template to a Record](#) for more information on how to create a letter with a template, if necessary.

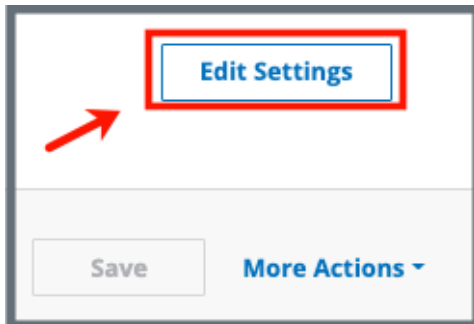
## 5. Edit a Template

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**Note:** This step explains how to edit a template within Letter Template Management. To make updates in a nonstandardized template, refer to [Attach a Template to a Record](#).

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

- 5.1 Click the desired template name under **Letter Template Name**. The template opens.
- 5.2 Click **Edit Settings**, to edit template name or description. See *Figure 7, Edit Settings*. The **Edit Settings** window opens.



**Figure 7: Edit Settings**

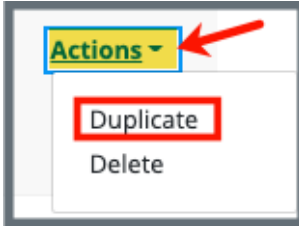
- 5.3 Update the template as desired. See [Create a New Template](#) step for further details, if necessary.
- 5.4 Click **Save** to save as a draft.
- 5.5 Click **Publish** to publish template.

## 6. Duplicate a Template

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

- 6.1 Select **Duplicate** from the **Actions** drop-down menu. See *Figure 8, Duplicate a Template*. The **Edit Settings** window pops up.



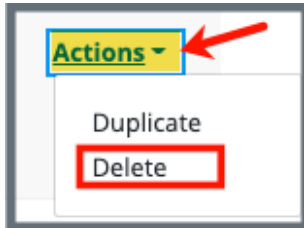
**Figure 8: Duplicate a Template**

- 6.2 Rename the template.
- 6.3 Update the fields, if desired.
- 6.4 Click **Save**. The **Letter Template Management** page opens and the letter can be edited.
- 6.5 Click **Save** to save the template as a draft.
- 6.6 Click **Publish** to publish the template.

## 7. Delete a Template

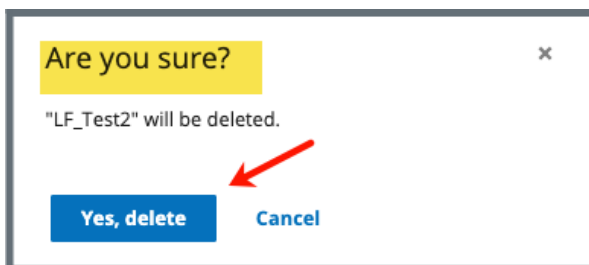
**Note:** SAGUs can delete any template in their state regardless of who created it. Pay attention before deleting a template that is owned by another user.

- 7.1 Select **Delete** from the **Actions** drop-down menu. See *Figure 9, Delete a Template*. The **Are you sure?** window pops up.

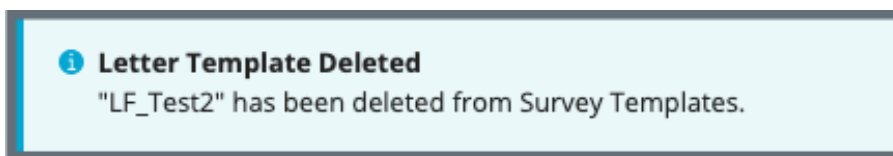


**Figure 9: Delete a Template**

- 7.2 Click **Yes, delete**. See *Figure 10, Are you sure? Popup*. The Letter Template Deleted Notification opens. See *Figure 11, Letter Template Deleted Notification*.



**Figure 10: Are you sure? Popup**



**Figure 11: Letter Template Deleted Notification**

**Note:** If a letter template was deleted by accident, it is possible to recover it. Contact the iQIES Service Center:

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

**Email:** iQIES@cms.hhs.gov

## 8. Attach a Template to a Record

8.1 Go to the specific Provider, Survey, Intake or Enforcement record with which the letter is associated.

8.2 Click **Letters** on the left menu. The **Letters** page opens.

8.3 Click **Add Letter**. The **Letter Overview** page opens.

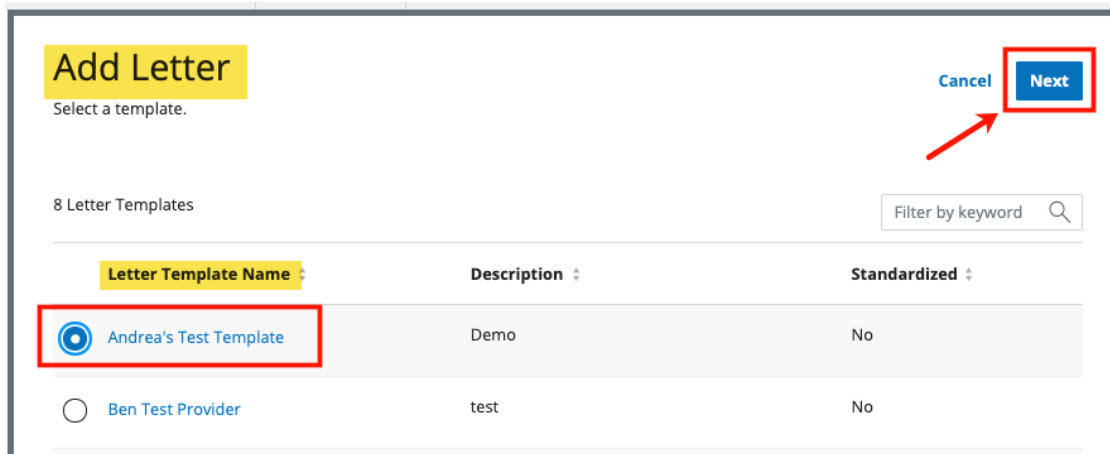
**Note:** If there is already an existing letter that can be reused, click **Generate from template** under the **Actions** drop-down menu and go to step 8.6.

8.4 Type the letter name under **Letter Name**. Add additional information, if desired.

8.5 Click **Save**. The **Letter: [Template Name]** page opens.

8.6 Click **Generate from template** under **Attachments**. The **Add Letter** page opens.

8.7 Click the circle next to the desired template. See *Figure 12, Add Letter Template*.



**Figure 12: Add Letter Template**

8.8 Click **Next**. The **Generate attachment from template** page opens.

8.9 Update the template as desired. See *Figure 13, Letter Template*.

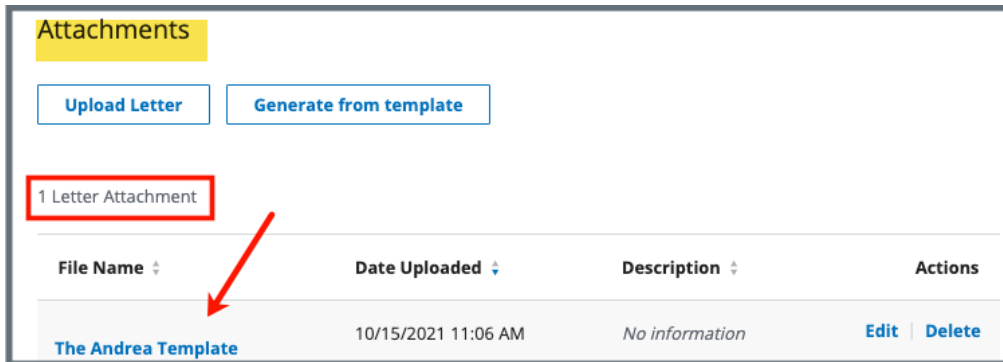
**Note:** A nonstandardized template can be modified. Textholders can be removed, words can be edited and updated. Be aware that the text changes apply only to the current letter and not to the template. Refer to [Edit a Template](#), to edit the original template.

**Note:** Standardized templates cannot be modified in the **Letters** section. To modify a standardized template, the template owner must edit the template in **Letter Template Management**.

**Figure 13: Letter Template**

1. **Print Preview:** Click **Print Preview** to preview the .pdf version of the letter. The letter can be downloaded from **Print Preview**, if desired.
2. **File Name:** Edit the name, if desired.

3. **Description:** Enter keywords, if desired. Keywords are descriptive words that help the user find the content. For example, the template title might be “Unsubstantiated Claim,” and the key words could be federal, minor. Separate the keywords with a comma.
  4. **WYSIWG Editor:** (What You See Is What You Get) allows content to be edited, including formatting, bulleting, etc.
  5. **Letter:** Shows how the letter looks. Verify inputs. Make any changes for nonstandardized templates, if desired.
  6. **Generate attachment:** Click **Generate attachment** to create a .pdf that attaches to provider/survey/intake/enforcement record.
- 8.10 Click **Generate Attachment** to attach the letter to the record.
- 8.11 Verify the letter is attached under **File Name**. See *Figure 14, Letter Attachment*.



**Figure 14: Letter Attachment**

## Appendix A: Provider Textholder Text

Each Providers, Surveys, Intakes, or Enforcements area has area-appropriate textholders. Provider Textholders are listed below.

Provider Textholders		
Admin 1 <sup>st</sup> Name	Admin Full Name	Admin Last Name
Admin Salutation	Admin Short with Salutation	Admin Title
Letter Sent Date	Medicaid ID Number	Provider Address 1 (Street)
Provider Address 2	Provider CCN	Provider City
Provider Doing Business As	Provider Fax Number	Provider Full Address
Provider Legal Name	Provider Mailing Address	Provider State
Provider State ID (FACID)	Provider State License Number	Provider Telephone
Provider Type Abbrev	Provider Type Full Description	Provider Zip
Title (Mapped from Provider Certification & Licensure tab)	Today's Date	Today's Date Full



## Appendix B: Survey Textholder Text

Each Providers, Surveys, Intakes, or Enforcements area has area-appropriate textholders. Survey Textholders are listed below.

Survey Textholders		
Admin 1 <sup>st</sup> Name	Admin Full Name	Admin Last Name
Admin Salutation	Admin Short with Salutation	Admin Title
Date # Days after Exit Date (Numbers)	Date # Days after Exit Date (Words)	Date # Days after Start Date (Numbers)
Date # Days after Start Date (Words)	Date CMS-2567 Issued	Date IDR Request Received
Event ID	Exit Date (Numbers)	Exit Date (Words)
Exit Date + 6 Months (Numbers)	Exit Date + 6 Months (Words)	First Revisit High Citations
Highest Scope/Severity (Disabled for HHA)	IDR Conducted By	IDR Conducted Date
IJ Citations	Letter Sent Date	List Intakes For This Survey
List Level A Cites (Disabled for HHA)	List Survey Team	List Tag Numbers Only
List Tag/Surveyor Test	List Tags Cited	Medicaid ID Number
Observation Text (9999)	Provider Address 1 (Street)	Provider Address 2
Provider CCN	Provider City	Provider Doing Business As
Provider Fax Number	Provider Full Address	Provider Legal Name
Provider Mailing Address	Provider State	Provider State ID (FACID)

Survey Textholders, cont.		
Provider State License Number	Provider Telephone	Provider Type Abbrev
Provider Type Full Description	Provider Zip	Revisit-Corrected Tags
Revisit-List New Tags	Revisit-List Repeat Tags	Start Date (Numbers)
Start Date (Words)	Survey All Tags IDR Status	Survey Extent(s)
Survey High Citations	Survey Purpose	Survey Regulation Type
Survey Revisits	Survey Revisits – Dates Only	Survey Team Leader
Survey Type	Third Visit Date	Title (Mapped from Provider Certification & Licensure tab)
Today's Date	Today's Date Full	

## Appendix C: Intake Textholder Text

Each Providers, Surveys, Intakes, or Enforcements area has area-appropriate textholders. Intake Textholders are listed below.

Intake Textholders		
ALL – Allegation Text[with redact]	ALL – Allegation Text[without redact]	Acknowledged
Activity Assignees	Admin 1 <sup>st</sup> Name	Admin Full Name
Admin Last Name	Admin Salutation	Admin Short with Salutation
Admin Title	Allegation Category	Alleged Event Date
Complainant Address	Complainant Names	Complainant Relationship (Primary)
Date # Days after Exit Date (Numbers)	Date # Days after Exit Date (Words)	Date # Days after Intake Date (Numbers)
Date # Days after Intake Date (Words)	Date # Days after Start Date (Numbers)	Date # Days after Start Date (Words)
Date # Days in Future (Numbers)	Date # Days in Future (Words)	Date # Working Days
Date CMS-2567 Issued	Date Follow-up Investigation	Date IDR Request Received
Date Received	Event ID	Exit Date (Numbers)
Exit Date (Words)	Exit Date + 6 Months (Numbers)	Exit Date + 6 Months (Words)
First Revisit High Citations	Highest Scope/Severity (Disabled for HHA)	IDR Conducted By
IDR Conducted Date	IJ Citations	Intake ID/Complaint Number

Intake Textholders, cont.		
Intake Recipient	Investigation Due Date	Investigation Due Date Long
Investigators	Letter Sent Date	List Intakes For This Survey
List Level A Cites (Disabled for HHA)	List Survey Team	List Tag Numbers Only
List Tag/Surveyor Test	List Tags Cited	Medicaid ID Number
Observation Text (9999)	Primary Complainant	Provider Address 1 (Street)
Provider Address 2	Provider CCN	Provider City
Provider Doing Business As	Provider Fax Number	Provider Full Address
Provider Legal Name	Provider Mailing Address	Provider State
Provider State ID (FACID)	Provider State License Number	Provider Telephone
Provider Type Abbrev	Provider Type Full Description	Provider Zip
Reference	Revisit-Corrected Tags	Revisit-List New Tags
Revisit-List Repeat Tags	Start Date (Numbers)	Start Date (Words)
Survey All Tags IDR Status	Survey Extent(s)	Survey High Citations
Survey Purpose	Survey Regulation Type	Survey Revisits
Survey Revisits – Dates Only	Survey Team Leader	Survey Type
Termination – 23 Days	Termination – 90 Days	Third Visit Date
Third Visit Date	Title (Mapped from Provider Certification & Licensure tab)	Today's Date
Today's Date Full		

## Appendix D: Enforcement Textholder Text

Each Providers, Surveys, Intakes, or Enforcements area has area-appropriate textholders. Provider Textholders are listed below.

Enforcement Textholders		
Admin 1 <sup>st</sup> Name	Admin Full Name	Admin Last Name
Admin Salutation	Admin Short with Salutation	Admin Title
All CMPs	CMP First CMS Notice Date	Changes from IDR
Changes from IDR (No Status)	Cycle Start + 3 Months	Cycle Start + 6 Months
Date Facility out of Compliance	Federal CMP Amount Due	Federal CMP(s)
Latest Denial of Payment Remedy	Letter Sent Date	Medicaid ID Number
Next Licensure Letter Remedies	Per Day CMP(s)	Per Instance CMP(s)
Provider Address 1 (Street)	Provider Address 2	Provider CCN
Provider City	Provider Doing Business As	Provider Fax Number
Provider Full Address	Provider Legal Name	Provider Mailing Address
Provider State	Provider State ID (FACID)	Provider State License Number
Provider Telephone	Provider Type Abbrev	Provider Type Full Description

Enforcement Textholders, cont.		
Provider Zip	Recommended Federal CMP(s)	Remedies with State Recommended Effective Date
Remedy List	Remedy List – All Federal	Remedy List – In Effect
Remedy List – Not in Effect	Remedy List – Pending	Remedy List – Recommended
Survey High Citations	Title (Mapped from Provider Certification & Licensure tab)	Today’s Date
Today’s Date Full		