iQIES Survey & Certification Job Aid

Letters

Overview

Use this job aid to add, generate, manage, and finalize letters in iQIES S&C.

Notes

- Most S&C General Users with additional permissions can work with letters.
- Templates cannot be shared across types (provider, survey, intake, enforcement).
- Letter templates are created in the Letter Template Management section and require a Letters Administrator user role. Review the Letter Template Management User Manual for detailed instructions on LTM.
- Letters are attached to the record in the specific provider, survey, intake, or enforcement. Review Letters, Notes, Attachments User Manual for further details, including screenshot, on how to upload letters or generate letters from a template.
- The Provider ePOC Administrator user role can only view letters. It cannot upload letters.

Add/Upload a Letter

1. Click **Letters** on the left menu to go to Letters.
2. Click **Add Letter**. The **Letter Overview** window opens.
3. Fill out the fields.
4. Click **Save**. The information updates in a new screen.
5. Scroll down to **Attachments**.
6. Click **Upload Attachment** to upload a letter from the computer.
7. Click **Select File**. The Windows Explorer pop-up window opens. For Mac users, the Finder pop-up window opens.
8. Select the file to be attached. Click **Open**. The file is attached and ready to be saved.
9. Type a file description in the **File Description** field, if desired.
10. Click **Save**. The letter is attached to the provider, survey, intake or enforcement.

Generate a Letter from an Existing Template

1. Click **Letters** on the left menu to go to Letters.
2. 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 the Generate from template step just below.
3. Type the letter name under **Letter Name**.
4. Fill out any additional fields, if desired.
5. Click **Save**. The **Letter: [Template Name]** page opens.
6. Scroll down to the **Attachments** section.
7. Click **Generate from template** under **Attachments**. The **Select a template** page opens.
8. Click the circle next to the desired template.
9. Click **Next**. The **Generate attachment** page opens.

   Notes:

   - Review Generate a Letter Using Multiple Template Areas to generate a template using two or more template areas.
   - **Next** is disabled until a selection is made.

10. Update the template as desired.

    Notes:

    - Only nonstandardized templates can be modified. Refer to the Letter Template Management User Manual on QTSO to edit the original template and for a list of textholders.
    - Custom textholders require information to be inserted. Refer to Add Text to a Custom Textholder.
    - Textholders can be removed, words can be edited and updated.
    - Text changes apply only to the current letter and not to the template. Only Letters Administrators can edit the original template.
    - Standardized templates cannot be modified in the **Letters** section of any S&C area (providers, surveys, intakes, enforcements). To modify a standardized template, the template owner must edit the template in Letter Template Management.

11. Click **Generate Attachment** to attach the letter to the record.
12. Verify the letter appears under **File Name**.

    Notes:

    - Click the file name to automatically download the letter to the user's computer.
    - Review Finalize a Letter Attachment to prevent further changes to the letter after upload.

Generate a Letter Using Multiple Template Areas

Note: At least two template areas (i.e., provider, survey, intake, enforcement) must be used to follow this step.

1. Click **Letters** on the left menu to go to Letters.
2. 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 the [Generate from template](#) step just below.

3. Type the letter name under **Letter Name**.
4. Fill out any additional fields, if desired.
5. Click **Save**. The **Letter: [Template Name]** page opens.
6. Scroll down to the **Attachments** section.
7. Click **Generate from template** under **Attachments**. The **Select a template** page opens.
8. Click the circle next to the desired template.
9. Click **Next**. **The Enter Letter Values window** opens after the template is selected.

   Note: **Next** is disabled until a selection is made.

10. Review **Select Values**.
    a. Select a survey under **Surveys**.

       Note: A survey is automatically selected when only one survey is available.

    b. Select an intake under **Intakes**.

       Note: An intake is automatically selected when only one intake is available.

    c. Type Custom Value, if needed.

       Notes:

       - A **Custom Value** is only available when a custom textholder has been added to the letter.
       - There may be more than one **Custom Value**.
       - Review [Add Text to a Custom Textholder](#) for more information.

11. Update the template as desired.

    Notes:

    - Do not click **Next** until template is updated.

- Only nonstandardized templates can be modified. Refer to the Letter Template Management User Manual on QTSO to edit the original template and for a list of textholders
- Custom textholders require information to be inserted. Refer to Add Text to a Custom Textholder.
- Textholders can be removed, words can be edited and updated.
- Text changes apply only to the current letter and not to the template. Only Letters Administrators can edit original templates.
- Standardized templates cannot be modified in the **Letters** section of any S&C area (providers, surveys, intakes, enforcements). To modify a standardized template, the template owner must edit the template in Letter Template Management.

12. Click **Generate Attachment** to attach the letter to the record.
13. Verify the letter appears under **File Name**.

    Notes:

    - Click the file name to automatically download the letter to the user's computer.
    - Review Finalize a Letter Attachment to prevent further changes to the letter after upload.

Add Text to a Custom Textholder

1. The **Enter Custom Textholder Text** pop-up window opens in the template.

   Note: Add information to Custom Textholders when a template includes Custom Textholders. The pop-up window opens automatically.

2. Complete the prompt(s).

   Note: There may be more than one custom textholder to fill out.

3. Click **Apply**.
4. The **Generate attachment from template** page opens.
5. Click **Generate Attachment** to attach the letter to the record.

Add Recipients to a Letter

1. Click Add Recipient to add a recipient. The Add Recipient page opens.
2. Fill out the fields.

   Notes:

   - **Primary Recipient** is automatically checked for the first recipient of the letter. It is grayed out for subsequent recipients.
   - **Letter Information** is not automatic and must be filled out manually.
   - **Date Sent** is the date the letter was sent.

3. Click **Save**. The Recipient Information updates.

   Notes:

   - Click **Return to Letter** to return to the **Letter Overview** page.
   - Click **Add Recipient** under the **Actions** menu on the Letter Overview page to add additional recipients.

Edit a Letter Overview

1. Click **Edit Overview** from the **Actions** drop-down menu to edit a **Letter Overview**.
2. Update fields.
3. Click **Save**.

Edit a Standardized Letter Attachment Description

Note: Standardized letters cannot be edited or changed. Only the **Description** can be updated.

1. Select a standardized template. The **Create attachment** page opens.
2. Edit or add a description in the **Description** field.
3. Click **Create Attachment**.

Edit a Nonstandardized Letter Attachment

Notes:

- Only letters generated from nonstandardized templates can be edited after the PDF is created.
- Finalized letters cannot be edited.

1. Click the letter name on the **Letters** page. The letter detail page opens with **Overview**, **Attachments**, and **Recipients** sections.
2. Scroll to the **Attachments** section.
3. Select **Edit** from the drop-down list under **Actions**. The **Edit Attachment** page opens.

   Note: **Last Modified** shows the date, time, and author (user) of the last modification of the file. **Last Modified** is updated each time the file is modified.
4. Make any necessary changes.
5. Click Save.

   Note: The letter can now be regenerated with these changes.

Finalize a Letter Attachment

Notes:

- No changes can be made once a letter is finalized.
- The letter has been generated from the template and is attached to the provider, survey, intake, or enforcement record.
    1. Select **Finalize** from the **Actions** drop-down menu to finalize a letter attachment. A pop-up window opens.
    2. Click **Finalize**.
    3. Verify the letter is finalized under **Actions**.

Delete a Letter Attachment

Note: Letters can only be deleted when no attachments are finalized.

1. Select **Delete** from the **Actions** drop-down menu to delete a letter. A pop-up window opens.
2. Click **Delete**. The letter is removed from the list.