



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Reports User Manual

Version 2.11
March 19, 2026

Table of Contents

1. Introduction	1
1.1 Getting Started in Reports – Important Information to Know	1
1.2 iQIES Service Center	3
1.3 Roles and Permissions	4
2. Manage a Report	5
2.1 New Reports Available	6
2.2 Find a Report with Category and Type	7
2.3 Find a Report with Keywords	9
2.4 Run or Schedule a Report	10
2.5 Save Report Criteria	13
2.6 Save a Report	15
2.7 Download a Report	16
2.8 Reports Main	17
2.9 My Reports	18
2.10 Reports Activity	20
Appendix A: List of Reports Generated On Demand	21

List of Figures

Figure 1: Notification Banner.....	1
Figure 2: Help Icon.....	4
Figure 3: Reports Tab.....	5
Figure 4: New Reports Available.....	6
Figure 5: Find a Report	7
Figure 6: Sample Report Types	7
Figure 7: Find Report Search Results	8
Figure 8: Report Keyword.....	9
Figure 9: Run Report.....	10
Figure 10: Schedule Report Run	11
Figure 11: Report Name Popup Window	12
Figure 12: Scheduled Report List	12
Figure 13: Save Criteria.....	13
Figure 14: Name Saved Criteria	13
Figure 15: Select Saved Criteria	13
Figure 16: Criteria Successfully Saved Banner	14
Figure 17: Save to My Reports Popup Window	15
Figure 18: Download a Report.....	16
Figure 19: Frequently Run Reports	17
Figure 20: My Reports	18
Figure 21: My Reports New Folder	19
Figure 22: Report Activity	20

1. Introduction

This user manual provides information for CMS, Providers, Vendors, Accrediting Organizations, Contractors, and State Agencies to effectively perform Report functions and the processes necessary to request, view, download, and save reports in iQIES.

1.1 Getting Started in Reports – Important Information to Know

Below is important general information about iQIES.

- Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [iQIES Onboarding Guide](#) for further information, if necessary.
- All screenshots included in this manual contain only test data. Current screens in iQIES may be different from what is shown in screenshots below.
- Screenshots are dependent on the user role and may not be an exact representation of each user’s actual access.
- Words highlighted in blue on iQIES are clickable links.
- A red asterisk (*) indicates a required field.
- To select more than one value in a list, click one value then press **Ctrl** on the keyboard (or **control** on a Mac keyboard).
- Review any yellow/orange notification banners. See *Figure 1, Notification Banner*. These banners can be closed (X’d out) if they do not apply or they are resolved.

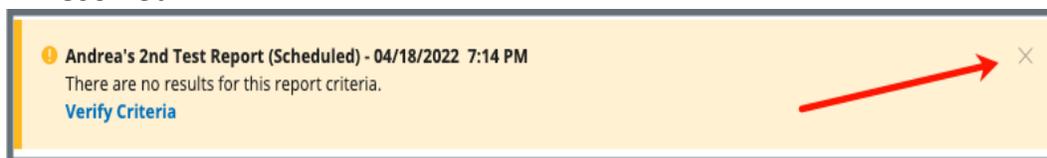


Figure 1: Notification Banner

- Below are the supported browsers for access to iQIES. **Do not use Internet Explorer.** It is not supported. Be sure to keep your browser updated.

For best results, please use the latest version of these browsers:

[Chrome](#)

[Firefox](#)

The latest versions of the browsers below are also supported:

[Microsoft Edge](#)

[Safari](#)

1.2 iQIES Service Center

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

For assistance accessing iQIES: Contact the iQIES Security Officer (SO) for your organization

For technical support: Contact the iQIES Service Center:

Phone: 800-339-9313

Email: iQIES@cms.hhs.gov

CCSQ Support Central: Create a new ticket or track an existing ticket: https://cmsqualitysupport.servicenow.com/ccsq_support_central

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.

1.3 Roles and Permissions

iQIES roles allow users to access information pertinent to their area of work. The examples provided in this document pertain to iQIES reports.

Access to the reports listed in Appendix A, List of Reports Generated on Demand, is available based upon the user's iQIES role.

Permissions are ultimately governed by HARP (Healthcare Quality Information System (HCQIS) Access Roles and Profile) access privileges. Contact the Security Official (SO) for your organization or the iQIES Service Center for issues relating to access and permissions.

Refer to the [iQIES User Roles Matrix](#) for detailed information on roles and permissions in iQIES.

For additional help, refer to <https://iqies.cms.gov/iqies/help> or click the help icon in the top right corner of the screen, see *Figure 2, Help Icon*, for further information.



Figure 2: Help Icon

2. Manage a Report

Most iQIES roles have access to run reports. Available report types are determined by the iQIES role. Access to reports is in the top tab, **Reports**. See *Figure 3, Reports Tab*.

This section addresses how to identify when new reports are available, and how to find, save, download, and otherwise manage a report.

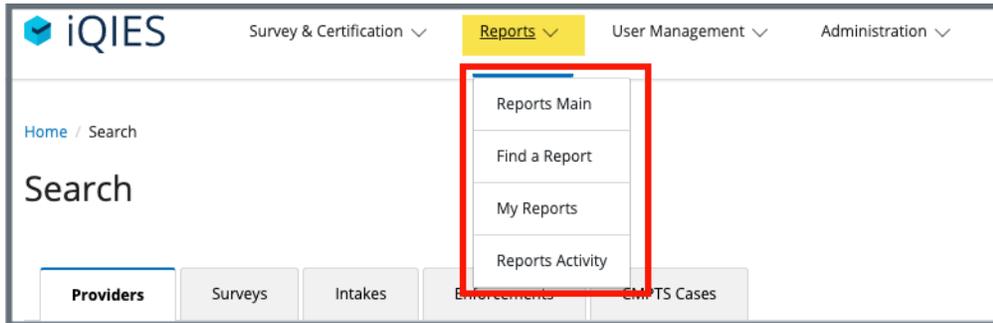


Figure 3: Reports Tab

2.1 New Reports Available

Purpose: To notify the user when a new report has been automatically added to their [My Reports](#) folder. See *Figure 4, New Reports Available*.

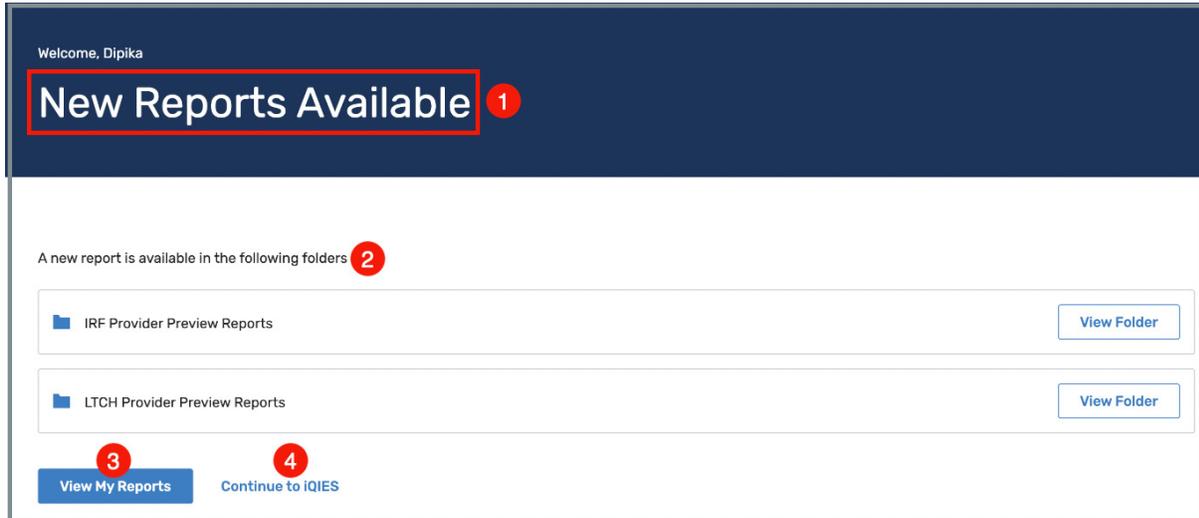


Figure 4: New Reports Available

Table 1: New Reports Available Callouts

Callout	Detailed Explanation
1	New Reports Available shows on the landing page when a new report has been automatically added to the My Reports folder.
2	The notification shows the folder where the report was added. Click View Folder next to the folder to view the report. Notes: <ul style="list-style-type: none"> There may be more than one report added. In the example above, there are two new reports. The New Reports Available notification disappears once View Folder is selected.
3	Click View My Reports to go to the My Reports landing page. All existing reports can be viewed. Refer to the My Reports section of this manual for further details.
4	Click Continue to iQIES to go directly to iQIES landing page.

2.2 Find a Report with Category and Type

Purpose: To find a specific report when the category and type are known.

- 2.2.1 Click **Find a Report** on the top menu **Reports** tab to find specific reports. See *Figure 5, Find a Report*. Refer to [Appendix A: List of Reports](#) for a detailed list of all reports in alphabetical order.

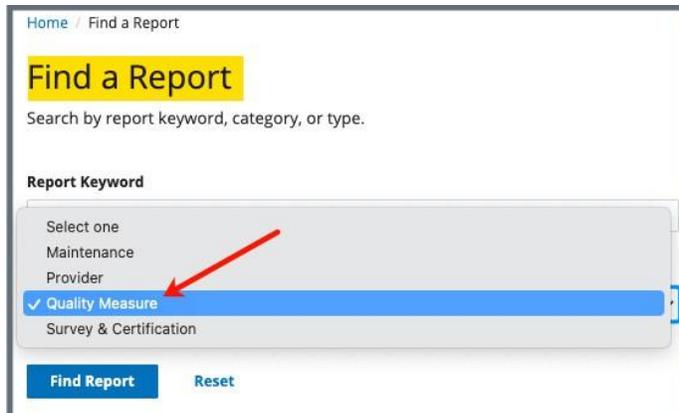


Figure 5: Find a Report

- 2.2.2 Select a **Report Category** from the drop-down list to access report types.
- 2.2.3 Select a report type from the **Report Type** drop-down menu. See *Figure 6, Sample Report Types*.

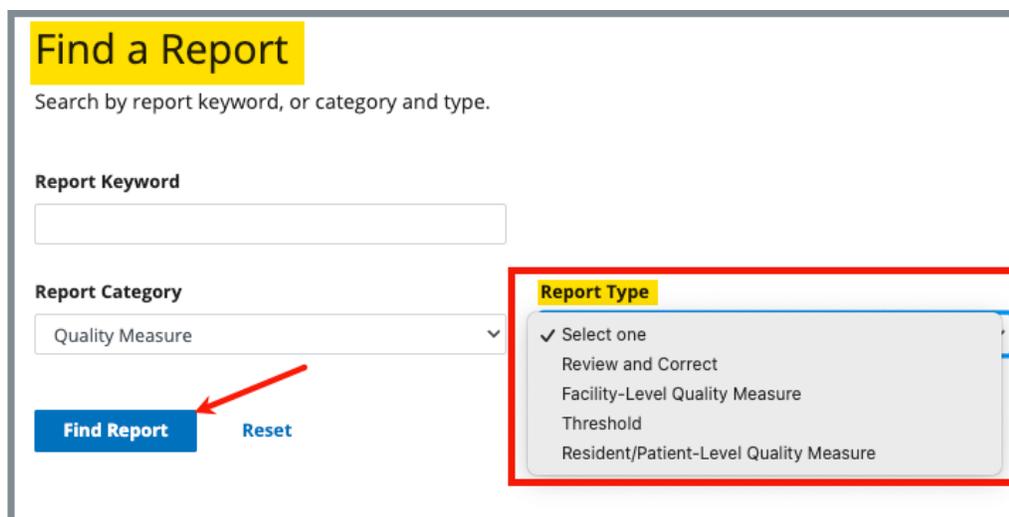


Figure 6: Sample Report Types

2.2.4 Click **Find Report**. The **Search Results** show the available reports for that report type. The example shows results from **Facility-Level Quality Measure** report type. See *Figure 7, Find Report Search Results*.

Note: To view all reports within a specific category, select the desired report category only (leave the report type unselected), then click **Find Report**.

Home / Find a Report

Find a Report

Search by report keyword, category, or type.

> [Show Filters](#)

Search Results

Report	Actions
Agency Patient-Related Characteristics (Case Mix) Report Provides the mean value of each OASIS patient-related characteristics (patient attributes or circumstances) measure for episodes of care that ended during two specified periods (current and prior) for the agency, along with national reference mean values for the current period.	Run Report
HHA Process Measures Report Displays, for each process quality measure, measure rates for episodes of care that ended during two specified periods (Current and Prior), as well as the national observed rate. Data are not available in these reports for Current or Prior Period Start Dates prior to 01/2018.	Run Report
Outcome Report Provides utilization outcome mean measure rates, physiologic, functional, cognitive, and emotional status end-result outcome measure rates, and claims-based outcome measure rates for an agency's patients with episodes of care that ended (for end-result outcomes) or began (for claims-based outcomes) in a specified period. It compares these findings to a national reference standard and a prior period for the agency. Some measures have risk-adjustment, in which case the prior measure value will be risk-adjusted. Data are not available in these reports for Previous or Current Start Dates prior to 01/2018.	Run Report
Potentially Avoidable Event Report Provides risk-adjusted Potentially Avoidable Event mean measure rates for episodes of care that ended during two specified periods (current and prior) and compares these findings to a national reference. Data are not available in these reports for Previous or Current Start Dates prior to 01/2018.	Run Report

Figure 7: Find Report Search Results

2.3 Find a Report with Keywords

Purpose: To find a specific report when the title, category, and type are not all known.

2.3.1 Click **Find a Report** on the top menu **Reports** tab. Refer to [Appendix A, List of Reports](#) for a detailed list of all reports in alphabetical order.

2.3.2 Type a report name or partial words in the **Report Keyword** box. See *Figure 8, Report Keyword*.

Notes:

- Do not use special characters, including quotation marks or hyphens.
- Select the **Report Category** to narrow down the search results, if desired

Find a Report

Search by report keyword, category, or type.

Hide Filters

Report Keyword

quality measure

Report Category

Select one

Find Report Reset

Figure 8: Report Keyword

2.3.3 Click **Find Report** to view reports that match the criteria noted.

2.4 Run or Schedule a Report

Purpose: To run a report or schedule a report to run at a later time. Not all reports can be viewed in real time.

2.4.1 Click **Run Report** or click the report title from the **Search Results** list. See [step 2.2.4](#). The **Run Report** page opens.

2.4.2 Complete the required information. This example uses the Agency Patient-Related Characteristics (Case Mix) Report. See *Figure 9, Run Report*.

Note: Select the different or additional state from the drop-down list under **State**, if necessary. The user's state is the default.

Run Report

Agency Patient-Related Characteristics (Case Mix) Report

Provides the mean value of each OASIS patient-related characteristics (patient attributes or circumstances) measure for episodes of care that ended during two specified periods (current and prior) for the agency, along with national reference mean values for the current period.

Enter the report criteria to run the report or save the criteria for a later time.

All required fields are marked with an asterisk (*)

Select Saved Criteria

Select one

Dates

Date Range

Select one

Current Begin Date *

12/2018

MM/YYYY

Current End Date *

11/2019

MM/YYYY

Prior Begin Date *

01/2018

MM/YYYY

Prior End Date *

11/2018

MM/YYYY

Providers

Search for providers and "Add" providers for each report run.

State *

Florida x Select... X

Provider Keyword

Search

Figure 9: Run Report

2.4.3 Click **Search**. The provider information populates below.

2.4.4 Select the desired provider. Click **Add** under **Actions**.

Note: If only one provider can be included for the report request, the Add link is removed for all other providers returned in the search. Click **Remove** under **Actions** to select a different provider.

2.4.5 Schedule or Run a Report.

To schedule a report:

2.4.5.1 Fill in **Report Scheduling** information.

Notes:

- The schedule report form displays automatically when the report cannot be viewed in real time.
- Click the box next to **Schedule Report Run** to schedule a report when there is a choice to view the report in real time. See *Figure 10, Schedule Report Run*. The scheduling form opens when the box is checked.
- The default **Run Time** is two hours later than the current time; however, this time can be adjusted so the report runs sooner or later.

The screenshot shows a form titled "Schedule Report Run". At the top, there is a checkbox labeled "Schedule Report Run" which is checked and enclosed in a red rectangular box. Below this checkbox is the instruction "Schedule the report to run one or many instances in the future." The form contains three main sections: "Repeat" with a dropdown menu set to "Never"; "Run Date" with a text input field containing "06/02/2022"; "Run Time" with a dropdown menu set to "6:37 PM"; and "Time Zone" with a dropdown menu set to "America/New York". At the bottom of the form, there are two buttons: a blue "Schedule Report" button and a grey "Cancel" button. A red arrow points from the right towards the "Schedule Report" button.

Figure 10: Schedule Report Run

2.4.5.2 Click **Schedule Report** at the bottom of the page. The **Report Name** popup window opens.

2.4.5.3 Type the report name. See *Figure 11, Report Name Popup Window*.

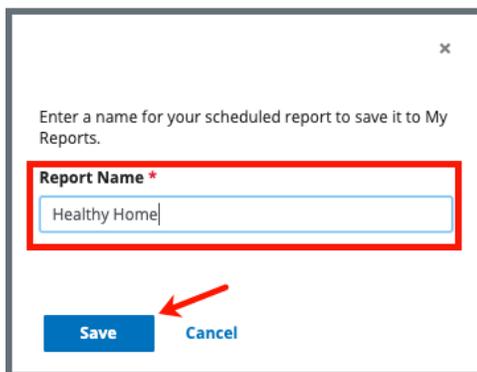


Figure 11: Report Name Popup Window

2.4.5.4 Click **Save**. The **Report Activity** page opens.

2.4.5.5 Verify a green banner shows the report was successfully scheduled and the report shows under **Scheduled Reports**. See *Figure 12, Scheduled Report List*. The report will run at scheduled time.

Note: A scheduled report can be edited or canceled. See step 2.10, [Reports Activity](#), for further details.

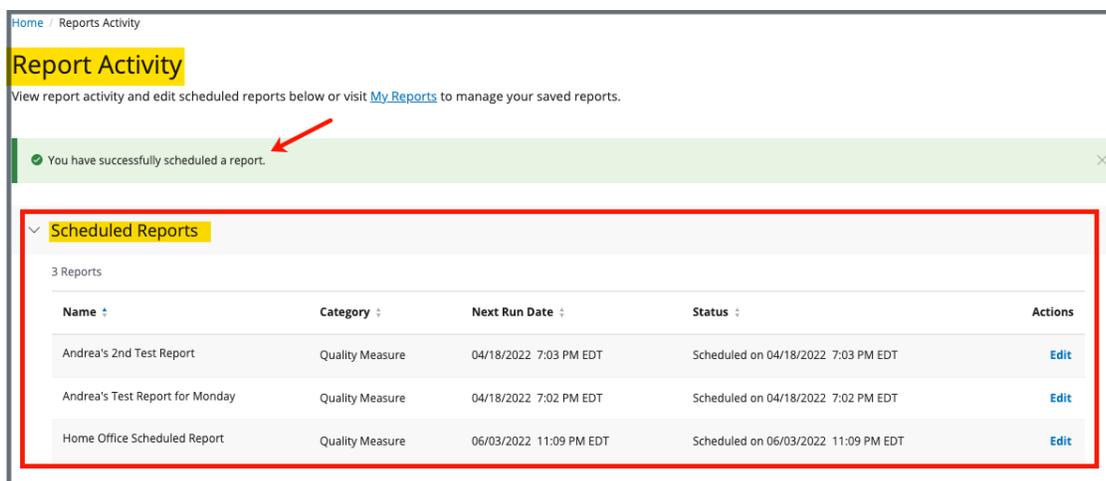


Figure 12: Scheduled Report List

To run a report:

2.4.5.6 Click **Run Report** at the bottom of the page.

Note: Verify all required information is filled out if the **Run Report** button is disabled.

2.4.5.7 The report opens.

2.5 Save Report Criteria

Purpose: To save filters for a report to run future reports with the same criteria.

2.5.1 Click **Save Criteria** at the bottom of the **Run Report** page to save the current criteria, if desired. See *Figure 13, Save Criteria*. A pop-up window opens.

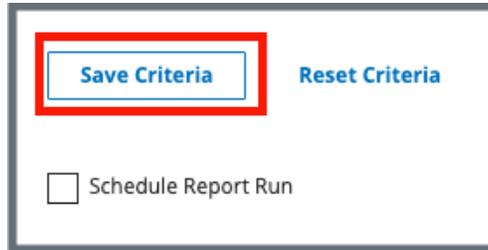


Figure 13: Save Criteria

2.5.2 Name the criteria. See *Figure 14, Name Saved Criteria*.

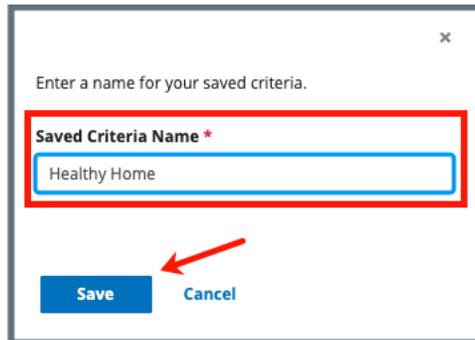


Figure 14: Name Saved Criteria

2.5.3 Click **Save**. The saved criteria appear in the **Select Saved Criteria** drop-down menu at the top of the **Run Report** page. See *Figure 15, Select Saved Criteria*.

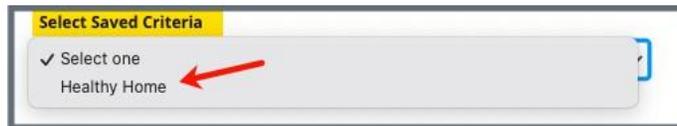


Figure 15: Select Saved Criteria

2.5.4 Verify a green banner **Criteria successfully saved** appears on the top of the screen. See *Figure 16, Criteria Successfully Saved Banner*.



Figure 16: Criteria Successfully Saved Banner

2.6 Save a Report

Purpose: To save a report.

- 2.6.1 Click **Save to My Reports** on the **Reports** page to save any report. See *Figure 17, Save to My Reports Popup Window*. The Report Name/Folder popup window opens.

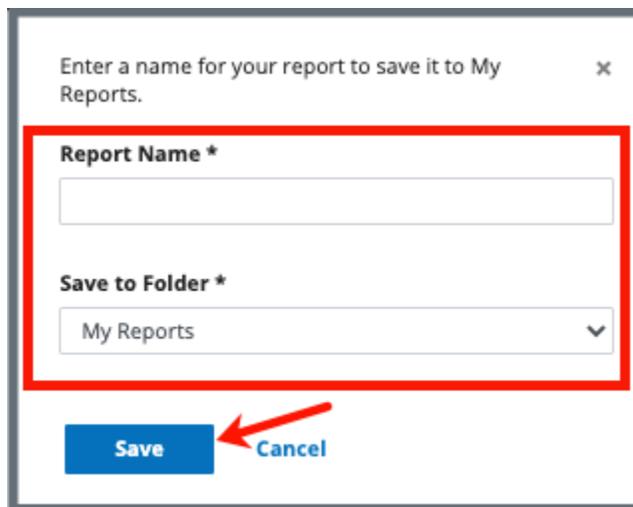


Figure 17: Save to My Reports Popup Window

- 2.6.2 Type the report name in the blank field.

- 2.6.3 Select the folder.

Note: The default folder is **My Reports**. Refer to step 2.9, [My Reports](#), on how to create folders or retrieve a saved report.

- 2.6.4 Click **Save**.

- 2.6.5 Verify a green banner shows that the report was successfully saved.

2.7 Download a Report

Purpose: To download a report.

Click **Download** on the **Reports** page and select the desired report-specific format (PDF, CSV, or Excel) from the drop-down menu. See *Figure 18, Download a Report*. A **Download Progress** bar opens when the PDF option is selected. The report appears in your computer's **Downloads** folder or double-click and open it from the Downloads bar on the bottom of the screen.

Note: Excel only appears in the drop-down menu under Download when the report is available in Excel.



Figure 18: Download a Report

2.8 Reports Main

Purpose: To access frequently-run reports.

Click **Reports Main** on the top menu **Reports** tab to view **Frequently Run Reports**. It is possible to find or view reports from this window. See *Figure 19, Frequently Run Reports*.

Note: These are frequently-run reports. Other reports may be available.

The screenshot shows the 'Reports Main' page. At the top, there are navigation links for 'Home' and 'Reports Main'. Below this is a 'Reports' header with a sub-header stating: 'Current and accurate reporting is vital to quality healthcare. Access past and frequently run reports below.' There are two buttons: 'Find Report' and 'View My Reports'. The main content is a table titled 'Frequently Run Reports' with the following data:

Report	Category	Last Run Date	Actions
Provider History Report	Survey & Certification	05/25/2022 7:01 PM	Run Report
IRF Patient-Level Quality Measure (QM) Report	Quality Measure	06/02/2022 4:56 PM	Run Report
Potentially Avoidable Event Report	Quality Measure	06/02/2022 4:44 PM	Run Report
Agency Patient-Related Characteristics (Case Mix) Report	Quality Measure	04/21/2022 8:18 AM	Run Report
Outcome Report	Quality Measure	06/02/2022 4:33 PM	Run Report
IRF QRP Provider Threshold Report	Quality Measure	06/02/2022 4:56 PM	Run Report
HHA Review and Correct Report	Quality Measure	06/01/2022 10:30 PM	Run Report
IRF Review and Correct Report	Quality Measure	06/02/2022 4:17 PM	Run Report

Figure 19: Frequently Run Reports

2.9 My Reports

Purpose: To view saved reports.

Note: There may be system-created folders in **My Reports**.

2.9.1 Click **My Reports** on the top menu **Reports** tab to find specific reports that have been saved. See *Figure 20, My Reports*.

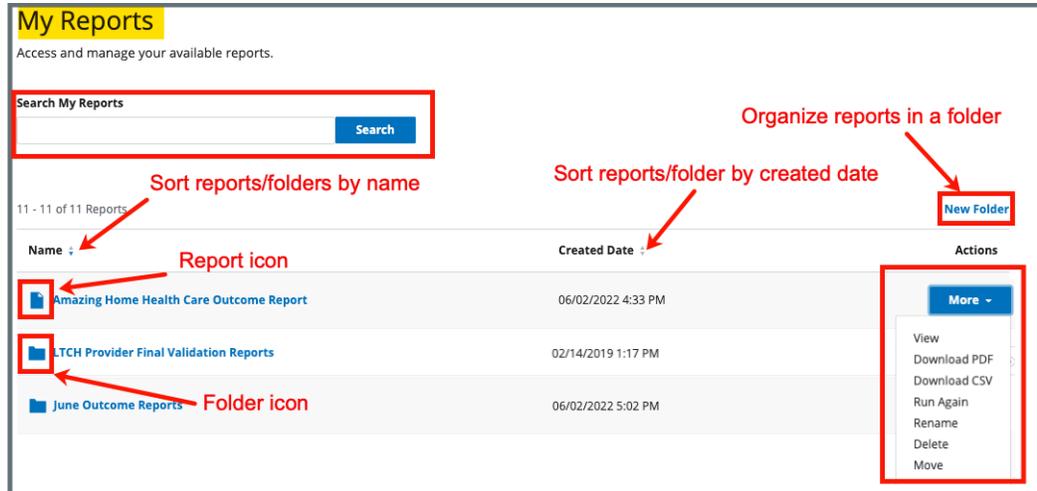


Figure 20: My Reports

Note: Click **More** under **Actions** to perform any of the following tasks:

- View** The report loads and displays online.
- Download PDF** The report is downloaded as a .pdf to the computer.
- Download CSV** The report is downloaded as a .csv (similar to an Excel spreadsheet).
- Run Again** The report is run again. No changes are made to the report criteria.
- Rename** The report can be renamed.
- Delete** The report can be deleted.
- Move** The report can be moved to a different folder, if a different folder exists. Refer to step 2.9.2 to create new folders.

Note: Click the arrows next to **Name** and **Created Date** to sort the reports.

2.9.2 Click **New Folder** to create a new folder. A pop-up window opens. See *Figure 21, My Reports New Folder*.

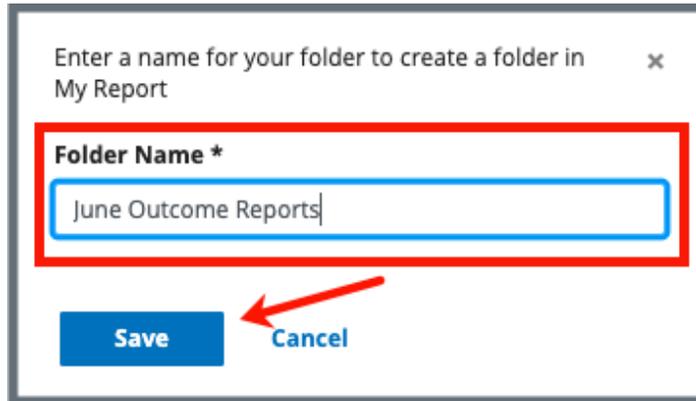
A screenshot of a web application's 'New Folder' dialog box. The dialog has a title bar that says 'Enter a name for your folder to create a folder in My Report' with a close button (x) on the right. Below the title bar is a text input field with the label 'Folder Name *' and the text 'June Outcome Reports' entered. The input field is highlighted with a red border. Below the input field are two buttons: a blue 'Save' button and a blue 'Cancel' button. A red arrow points from the 'Cancel' button towards the 'Save' button.

Figure 21: My Reports New Folder

2.9.3 Type the name for the folder. Click **Save**. Reports can be moved into the folder.

Notes:

- The folder can be renamed, deleted, or moved. Click **More** under **Actions**, to perform one of those tasks.
- All folders can be accessed under **My Reports**. Click the folder name and the folder opens with the reports that have been saved to that folder.

2.10 Reports Activity

Purpose: To view scheduled and recently-run reports.

Click **Reports Activity** on the top menu **Reports** tab to view personal report activity. This activity is all the report activity that was run or is scheduled to run. See *Figure 22, Report Activity*.

The screenshot shows the 'Report Activity' page. At the top, there is a green success message: 'You have successfully scheduled a report.' with a red arrow pointing to it. Below this is a section for 'Scheduled Reports' containing a table with 3 reports. Each report has columns for Name, Category, Next Run Date, Status, and Actions (Edit). Below that is a 'Report Log' section with a filter box and a table showing 1-20 of 32 reports. The Report Log table has columns for Name, Category, Run Date, Status, and Actions (Remove).

Name	Category	Next Run Date	Status	Actions
Andrea's 2nd Test Report	Quality Measure	04/18/2022 7:03 PM EDT	Scheduled on 04/18/2022 7:03 PM EDT	Edit
Andrea's Test Report for Monday	Quality Measure	04/18/2022 7:02 PM EDT	Scheduled on 04/18/2022 7:02 PM EDT	Edit
Home Office Scheduled Report	Quality Measure	06/03/2022 11:09 PM EDT	Scheduled on 06/03/2022 11:09 PM EDT	Edit

Name	Category	Run Date	Status	Actions
<input type="checkbox"/> Home Office Scheduled Report (Scheduled)	Quality Measure	06/03/2022 11:09 PM	SCHEDULED	Remove
<input type="checkbox"/> IRF QRP Provider Threshold Report	Quality Measure	06/02/2022 4:56 PM	COMPLETE	Remove
<input type="checkbox"/> IRF Patient-Level Quality Measure (QM) Report	Quality Measure	06/02/2022 4:56 PM	COMPLETE	Remove

Figure 22: Report Activity

Notes:

- Reports can be filtered or removed. Click **Remove** under **Actions** to remove a report.
- Scheduled reports can be edited. Click **Edit** under **Actions** to edit or cancel a scheduled report.

Appendix A: List of Reports Generated On Demand

[HHA Reports](#)

[Hospice Reports](#)

[LTCH Reports](#)

[LTCSP Reports](#)

[MDS Reports](#)

[PBJ Reports](#)

[S&C Reports](#)

Report Name	Report Category	Report Type	Report Purpose
HHA			
HHA List – No Successful Production Submissions Report	Maintenance	OASIS Assessment Maintenance	The HHA List – No Successful Production Submissions report provides a list of all HHAs (active or terminated) who have had no OASIS submissions, or providers who have had submissions but no accepted OASIS assessments in iQIES for the selected time period. Only State Agency and CMS users are allowed to view/run this report.
HHA Activity Report	Provider	Submission	Displays a list of accepted assessments, including modification and inactivation requests submitted by or on behalf the selected agency during the user specified period.
HHA Roster Report	Provider	Roster	Displays the patients for whom the last submitted RFA is 01, 03, 04, or 05, and M0090 is prior to the current date by no more than 180 days for one or more select agencies.

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
HHA Discharge Report	Provider	Admission/Discharge	Provides information about the patients discharged from the selected agency during the specified period.
OASIS Agency Final Validation	Provider	Validation	Contains detailed information regarding all records for the agency contained in the submission file. This includes the number of records that were accepted or rejected, if any, encountered.
OASIS Submitter Final Validation Report	Provider	Validation	<p>Contains detailed information regarding the records contained in the user defined submission file. This includes the number of records that were accepted or rejected, as well as warning and fatal errors for the records.</p> <p>This report can only be requested by the original assessment submitter. Use the Submission ID to request the report.</p>
HHA Error Summary by Agency	Provider	Error	Summarizes the errors encountered in submissions by the selected agency during a specified period.

Report Name	Report Category	Report Type	Report Purpose
OASIS Error Detail Report	Provider	Error	Displays assessment information and error details for user selected error numbers and submission date within the requested date range where selected errors were encountered in successful submissions made by or on behalf of the selected agency. Included in the report are the OASIS items and submitted data that caused the selected error to occur.
Agency Patient-Related Characteristics (Case Mix) Report	Quality Measure	Facility Level Quality Measure	Provides the mean value of each OASIS patient-related characteristics (patient attributes or circumstances) measure for episodes of care that ended during two specified periods (current and prior) for the agency, along with national reference mean values for the current period.
Agency Patient-Related Characteristics (Case Mix) Tally Report	Quality Measure	Resident/Patient-Level Quality Measure	Displays, for the selected agency and timeframe, each episode of care used in the calculation for the Agency Patient-Related Characteristics measures and the calculated value for each measure. Patient characteristics with a percent sign (%) included in the characteristic description are those characteristics that are either present or absent. Values are presented in the report as "y" if the patient characteristic was present, "n" if the patient characteristic was not present, and "-" if data were not available.

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
HHA Process Measures Report	Quality Measure	Facility Level Quality Measure	Displays, for each process quality measure, measure rates for episodes of care that ended during two specified periods (Current and Prior), as well as the national observed rate. Data are not available in these reports for Current or Prior Period Start Dates prior to 01/2018.
HHA Review and Correct Report	Quality Measure	Review and Correct	Allows providers to review their QM data to identify if there are any corrections or changes needed to the assessment-based data prior to the quarter's data submission deadline, which is 4.5 months following the end of the reporting quarter. The report will provide a breakdown by measure and by quarter, of the HHA's assessment-based QM data for four rolling quarters. The report also identifies whether each quarter's data correction period is open or closed as of the report run date. The report output will also provide patient-level data in a CSV format the user can access via the user's My Reports page.

Report Name	Report Category	Report Type	Report Purpose
<p>HHA Tally: Outcome Report</p>	<p>Quality Measure</p>	<p>Resident/Patient-Level Quality Measure</p>	<p>Displays, for the selected agency and timeframe, each episode of care that was used in the calculations for the Outcome Report. For each episode of care, the patient's name, SOC/ROC Date, Branch ID, and the outcome measure value will be listed. The following values may be present: 'y' indicates the measure was achieved; 'n' indicates the measure was not achieved; '-' indicates there was no data available; and '/' indicates the stay was excluded from the measure.</p>
<p>HHA Tally: Process Report</p>	<p>Quality Measure</p>	<p>Resident/Patient-Level Quality Measure</p>	<p>Displays, for the selected agency and timeframe, each episode of care that was used in the calculations for the Process Measures Report. For each episode of care, the patient's name, SOC/ROC Date, Branch ID, and the process measure value are listed. The following values may be present: 'y' indicates the measure was achieved; 'n' indicates the measure was not achieved; '-' indicates there was no data available; and '/' indicates the stay was excluded from the measure.</p>

Report Name	Report Category	Report Type	Report Purpose
Outcome Report	Quality Measure	Facility Level Quality Measure	Provides utilization outcome mean measure rates, physiologic, functional, cognitive, and emotional status end-result outcome measure rates, and claims-based outcome measure rates for an agency's patients with episodes of care that ended (for end-result outcomes) or began (for claims-based outcomes) in a specified period. It compares these findings to a national reference standard and a prior period for the agency. Some measures have risk-adjustment, in which case the prior measure value will be risk-adjusted. Data are not available in these reports for Previous or Current Start Dates prior to 01/2018.
Potentially Avoidable Event: Patient Listing Report	Quality Measure	Resident/Patient-Level Quality Measure	Lists each of the Potentially Avoidable Event measures, statistics for each, and the patients who experienced those events for a select agency during a specified period.
Potentially Avoidable Event Report	Quality Measure	Facility Level Quality Measure	Provides risk-adjusted Potentially Avoidable Event mean measure rates for episodes of care that ended during two specified periods (current and prior) and compares these findings to a national reference. Data are not available in these reports for Previous or Current Start Dates prior to 01/2018.

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
Hospice			
Hospice Activity Report	Provider	Submission	Displays a list of accepted records and inactivation requests that were submitted by or on behalf of select providers during a specified period.
Hospice Admissions/HUVs/Discharges Report	Provider	Admission/Discharge	Provides information about the patients who were admitted to, had HUVs submitted and/or were discharged from the selected provider during the specified period.
Hospice Error Detail Report	Provider	Error	Displays assessment information and error details for user selected error numbers and submission date within the requested date range where selected errors were encountered in successful submissions made by or on behalf of the selected provider. Included in the report are the assessment items and submitted data that caused the selected error to occur.
Hospice Error Number Summary by Provider	Provider	Error	Summarizes the errors encountered in Hospice records submitted by or on behalf of select providers during a specified period.
Hospice Record Errors by Field by Provider Report	Provider	Error	Summarizes by provider and Error Numbers the errors encountered in submitted HIS records during a specified period by select Hospices.

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
Hospice Final Validation Report	Provider	Validation	Displays detailed information about the status of select submission files for the provider. The report indicates whether the records submitted in each were accepted or rejected and details the warning and fatal errors encountered.
Hospice Roster	Provider	Roster	Displays a list of patients for the selected providers, for whom the most recent accepted Hospice record is not a discharge record (A0250 = 09) and the target date is less than 36 months prior to the report run date.
Hospice Submission Statistics by Provider Report	Provider	Submission	Summarizes the submissions made by or on behalf of select providers during a specified period.
Hospice Submitter Final Validation	Provider	Validation	<p>Displays detailed information about the status of a select submission file. The report indicates whether the records were accepted or rejected and displays warning and fatal errors encountered.</p> <p>This report can only be requested by the original assessment submitter. Use the Submission ID to request the report.</p>
Hospice Timeliness Compliance Threshold Report	Provider	Submission	Displays the number and percentage of Hospice records submitted within the 30-day submission deadline for the Annual Payment Update (APU) determination for select providers.

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
IRF			
IRF Arthritis Verification Report	Administration	Administration Reports	Lists patients with an IRF-PAI record during the cost reporting period and item 24A1 (Arthritis Conditions Recorded) contained a “Yes” response. This report is used in conjunction with the IRF Rehab Eligibility report for determining IRF PPS compliance (60% rule).
IRF Rehab Eligibility Report	Administration	Administration Reports	Provides presumptive (the 60% rule) calculations of Inpatient Rehabilitation Facility Medicare eligibility. Each IRF’s cost reporting period and associated review periods are displayed, in addition to the IRF’s percent of compliance for the cost reporting period.
IRF-PAI Discharges Report	Provider	Admission/Discharge	Lists all patients discharged from the IRF within the requested date range.
IRF-PAI Error Detail Report	Provider	Error	Displays assessments with a submission date within the requested date range and an error number equal to one of the selected error numbers. Included in the report are the IRF-PAI items and submitted data that caused the selected error to occur.
IRF-PAI Error Number Summary by Facility by Vendor	Provider	Error	Summarizes the errors encountered in IRF-PAI records by vendor submitted by or on behalf of the provider during a specified time period.

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
IRF-PAI Errors by Field by Facility Report	Provider	Error	Lists the errors encountered in the fields of successful submissions made by or on behalf of select facilities during a specified period.
IRF-PAI Facility Final Validation Report	Provider	Validation	Displays detailed information regarding all the records for the facility contained in the submission file. The report indicates whether the records were accepted or rejected and displays the warning and fatal errors, if any, encountered.
IRF-PAI Submission Activity Report	Provider	Submission	Lists the IRF-PAI records, including modification and inactivation requests, that were accepted by or on behalf of the provider during a specified time period.
IRF-PAI Submission Statistics by Facility Report	Provider	Submission	Lists the submissions made by or on behalf of select facilities during a specified period.

Report Name	Report Category	Report Type	Report Purpose
<p>IRF-PAI Submitter Final Validation Report</p>	<p>Provider</p>	<p>Validation</p>	<p>Displays detailed information regarding all the records from all providers contained in the submission file. The report shall indicate whether the records were accepted or rejected and shall display the warning and fatal errors for all records in the submission file. Only users who uploaded the submission file will have access to this report.</p> <p>This report can only be requested by the original assessment submitter. Use the Submission ID to request the report.</p>
<p>IRF Facility-Level Quality Measure (QM) Report</p>	<p>Quality Measure</p>	<p>Facility Level Quality Measure</p>	<p>Provides facility-level quality measure results for a select 12-month period. Quality measure results are computed from the data submitted in the Inpatient Rehabilitation Facility Patient-Assessment Instrument (IRF-PAI), Centers for Disease Control and Prevention (CDC) National Healthcare Safety Network (NHSN), and Medicare Fee-For-Service (FFS) Claims data sources.</p>
<p>IRF Patient-Level Quality Measure (QM) Report</p>	<p>Quality Measure</p>	<p>Resident/Patient-Level Quality Measure</p>	<p>Lists each patient with a qualifying Inpatient-Rehab Facility (IRF) Patient Assessment Instrument (IRF-PAI) record used to calculate the assessment-level quality measure values for a select 12-month period. The report displays each patient's name and indicates how/if the patient's assessment affected the IRF's quality measure scores.</p>

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
IRF QRP Provider Threshold Report	Quality Measure	Threshold	Allows providers to monitor their compliance status of the required data submission for the IRF Quality Reporting Program (QRP) measures for the current Annual Increase Factor (AIF) by fiscal year.
IRF Review and Correct Report	Quality Measure	Review and Correct	Allows facilities to review their assessment-based QM data to identify if there are any corrections or changes needed to the data prior to the quarter's data submission deadline, which is 4.5 months after the end of the calendar quarter. The report will provide a breakdown by measure and quarter, of the IRF's QM data for four rolling quarters, along with a cumulative total of the quarters combined. The report also identifies whether each quarter's data correction period is open or closed as of the report run date.
LTCH			
LTCH Admission Report	Provider	Admission/Discharge	Lists patients admitted to the LTCH provider during a specified time frame.
LTCH Discharge	Provider	Admission/Discharge	Lists the patients discharged (A0250 = 10, 11 or 12) from the provider during a specified timeframe.

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
LTCH Error Details Report	Provider	Error	Displays assessments with a submission date within the requested date range and an error number equal to one of the selected error numbers. Included in the report are the LTCH items and submitted data that caused the selected error to occur.
LTCH Error Number Summary by Provider and Vendor	Provider	Error	Summarizes the errors encountered in LTCH CARE records submitted by or on behalf of the provider during a specified time period.
LTCH Errors by Field by Provider	Provider	Error	Lists the errors encountered in the fields of successful submissions made by or on behalf of select LTCH providers during a specified time frame.
LTCH Provider Final Validation	Provider	Validation	Displays detailed information regarding all the records for the provider contained in the submission file. The report indicates whether the records were accepted or rejected and displays the warning and fatal errors, if any encountered.
LTCH Roster	Provider	Roster	Lists the patients in the LTCH on the day the report is run. Only patients for whom the most recent accepted LTCH CARE record is not a discharge record (A0250 = 10, 11 or 12) are reported.

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
LTCH Submission Activity	Provider	Submission	Lists the LTCH CARE records, including modification and inactivation requests that were submitted by or on behalf of the provider during a specified time period.
LTCH Submission Statistics	Provider	Submission	Summarizes the submissions made by or on behalf of the provider during a specified time period.
LTCH Submitter Final Validation	Provider	Validation	<p>Displays detailed information regarding all the records for the selected Inpatient Rehab Facility contained in the submission file. The report indicates whether the records were accepted or rejected and displays the warning and fatal errors for all records.</p> <p>This report can only be requested by the original assessment submitter. Use the Submission ID to request the report.</p>
LTCH Facility-Level Quality Measure (QM) Report	Quality Measure	Facility Level Quality Measure	Provides facility-level quality measure results for a select 12-month period. Quality measure results are computed from the data submitted in the Long Term Care Hospital Continuity Assessment Record and Evaluation (LTCH CARE) Data Set, Centers for Disease Control and Prevention (CDC) National Healthcare Safety Network (NHSN), and Medicare Fee-For-Service (FFS) Claims data sources.

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
LTCH Patient-Level Quality Measure (QM) Report	Quality Measure	Resident/Patient-Level Quality Measure	Identifies each patient with qualifying Long-Term Care Hospital (LTCH) Continuity Assessment Record and Evaluation (CARE) assessment records used to calculate the assessment-based quality measure values for a select 12-month period. The report displays each patient's name and indicates how/if the patient's assessments affected the LTCH's quality measure scores.
LTCH QRP Provider Threshold Report	Quality Measure	Threshold	Allows providers to monitor their compliance status of the required data submission for the LTCH Quality Reporting Program (QRP) for the Annual Payment Update (APU) by fiscal year.
LTCH Review and Correct Report	Quality Measure	Review and Correct	Allows providers to review their assessment-based data to identify if there are any corrections or changes needed to the data prior to the quarter's data submission deadline, which is 4.5 months after the end of the calendar quarter. The report will provide a breakdown, by measure and by quarter, of the LTCH's assessment-based QM data for four rolling quarters, except for NQF #2632, which will contain QM data for eight rolling quarters, along with a cumulative total of the quarters combined.
LTCSP			
Facility Task Data Report	LTCSP	Survey Documentation Reports	Lists Facility Tasks, the surveyors (name and ID) assigned to the Facility Task, and the residents (last name, first name).

iQIES Reports User Manual

Report Name	Report Category	Report Type	Report Purpose
Initial Pool Data Report	LTCSP	Survey Documentation Reports	Lists Care Area descriptions, RI, RO and RR responses for each Care Area, including blank responses, documentation for each Care Area, and MDS Discrepancy if applicable
LTCSP Initial Pool Report	LTCSP	Survey Reports	Displays a list of residents associated to the initial pool with their room number grouped by surveyor, including residents that have no assigned surveyor. The report also shows the residents associated with any triggered facility task.
LTCSP Investigation Report	LTCSP	Survey Reports	Displays care areas and residents marked for further investigation and not included in the sample and care areas and investigation areas for residents included in the sample.
LTCSP Surveyor Workload Report	LTCSP	Survey Reports	Displays the surveyor workload for a given survey and includes the Resident Name, ID, Room Number, Surveyor assigned and the reason the Investigative Area was triggered. The report is sorted by Investigative Area.
MDS Indicator Facility Rate Report	LTCSP	Survey Reports	Lists the MDS Indicators associated with the residents selected, the total count of residents with a specific MDS indicator, and the percentage of the total residents with a specific MDS Indicator.

Report Name	Report Category	Report Type	Report Purpose
Potential Citation Data Report	LTCSP	Survey Documentation Reports	Displays the cited and non-cited tags and descriptions with scope and severity. The report also displays the investigative areas that are not in compliance with the included residents, surveyor who performed the investigation, severity for the specific resident. Additionally, for non-cited tags, displays the reason this tag was not cited.
Resident Investigation Data Report	LTCSP	Survey Documentation Reports	Displays critical element detail, tags cited, resident notes, handwritten drawings, and investigation notes from resident investigations. It includes the option to run for specific residents, surveyors or investigative areas. If sorted by Investigative Area (default), report is sorted by investigative area with associated residents (last name, first name) under that area. If sorted by Resident, report is sorted by resident (last name, first name), with associated investigations listed.
Surveyor Notes Report	LTCSP	Survey Documentation Reports	Lists any notes surveyors recorded for the selected survey. Lists all surveyors by name (last name, first name) and ID
Team Meeting Notes Report	LTCSP	Survey Documentation Reports	Lists the full text of the Team Meeting section for LTCSP state agency and comparative surveys and includes the information on the Initial Pool and Investigation tabs.

MDS				
	MDS 3.0 QM Package	Package Reports	Quality Measure	Allows users to run one or multiple MDS 3.0 Quality Measure reports using the same report criteria selections for one or more providers in a single report request. All data for the selected reports will be returned in files separated by provider.
	MDS 3.0 Activity	Provider	Submission	Displays a list of accepted assessments, tracking records and inactivation requests that were submitted by the requested facility(ices) for the time frame selected.
	MDS 3.0 Admissions/ Reentry- Discharges Report	Provider	Admission/Discharge	Provides information about the residents who were admitted to and/or discharged from the selected facility during the specified period.
	MDS 3.0 Missing OBRA Assessment	Provider	Submission	Displays the residents for whom the target date of the most recent OBRA assessment (other than a discharge or death record) is more than 138 days prior to the report run date. The report also includes residents for whom no OBRA record was submitted for a current episode that began more than 60 days prior to the report run date.

iQIES Reports User Manual

	<p>MDS 3.0 NH Error Detail Report</p>	<p>Provider</p>	<p>Error</p>	<p>Displays assessment information and error details for user selected error numbers and submission date within the requested date range where selected errors were encountered in successful submissions made by or on behalf of the selected provider. Included in the report are the assessment items and submitted data that caused the selected error to occur.</p>
	<p>MDS 3.0 NH Final Validation Report</p>	<p>Provider</p>	<p>Validation</p>	<p>Displays detailed information regarding the records contained in the submission file for the facility. The report indicates whether the records were accepted or rejected and displays the warning and fatal errors for the records.</p>
	<p>MDS 3.0 Roster Report</p>	<p>Provider</p>	<p>Roster</p>	<p>Displays a list of residents of a facility for whom the latest accepted, federally required assessment is not a discharge assessment (A0310F = 10, 11, or 12) and the target date is less than 24 months prior to the report run date. This report uses data from SUB_REQ 3 (A0410 Unit Certification or Licensure Designation = 3) only. (Excludes state-only required assessments (A0410 = 2)).</p>

iQIES Reports User Manual

	<p>MDS 3.0 SB Error Detail Report</p>	<p>Provider</p>	<p>Error</p>	<p>Displays assessment information and error details for user selected error numbers and submission date where selected errors were encountered in successful submissions made by or on behalf of the selected facility. Included in the report are the MDS 3.0 items and submitted data that caused the selected error to occur.</p>
	<p>MDS 3.0 SB Final Validation Report</p>	<p>Provider</p>	<p>Validation</p>	<p>Displays detailed information regarding the records contained in the submission file for the swing bed unit. The report indicates whether the records were accepted or rejected and displays the warning and fatal errors for all records.</p>
	<p>MDS 3.0 Submitter Final Validation Report</p>	<p>Provider</p>	<p>Validation</p>	<p>Displays detailed information regarding the records from all facilities contained in the submission file. The report indicates whether the records were accepted or rejected and displays the warning and fatal errors for all records in the submission file.</p> <p>This report can only be requested by the original assessment submitter. Use the Submission ID to request the report.</p>

	<p>MDS 3.0 Facility Characteristics Report</p>	<p>Quality Measure</p>	<p>Facility-Level Quality Measure</p>	<p>Displays facility demographic information based upon data submitted in the MDS 3.0 records and includes comparison state and national percentages for a specified timeframe. By comparing the facility percentages with the state and national average percentages, you can determine whether the facility’s demographic characteristics differ from the norm. Facility characteristics may indicate a need to concentrate a review on certain resident groups.</p>
	<p>MDS 3.0 Facility-Level Quality Measure (QM) Report</p>	<p>Quality Measure</p>	<p>Facility-Level Quality Measure</p>	<p>Displays the facility percentage and how the facility compares with other facilities in their state and in the nation for each quality measure. This report helps facilities identify possible areas for further emphasis in facility quality improvement activities or investigation during the survey process.</p>
	<p>MDS 3.0 Resident-Level Quality Measure (QM) Report</p>	<p>Quality Measure</p>	<p>Resident/Patient-Level Quality Measure</p>	<p>Displays the residents (active and discharged) who were included in the calculations for the selected facility and period that were used to produce the MDS 3.0 Facility-Level Quality Measure (QM) Report. The report lists the residents by name and indicates the measures, if any, triggered by each.</p>

iQIES Reports User Manual

	<p>SNF QRP Facility-Level Quality Measure (QM) Report</p>	<p>Quality Measure</p>	<p>Facility-Level Quality Measure</p>	<p>Provides facility-level quality measure results for a select 12-month period. Quality measure results are computed from the data submitted in the Minimum Data Set (MDS), Centers for Disease Control and Prevention (CDC) National Healthcare Safety Network (NHSN), and Medicare Fee-For-Service (FFS) Claims data sources.</p>
	<p>SNF QRP Provider Threshold Report</p>	<p>Quality Measure</p>	<p>Threshold</p>	<p>Allows providers to monitor their compliance status of the required data submission for the SNF Quality Reporting Program (QRP) for the Annual Payment Update (APU) by Fiscal Year (FY).</p>
	<p>SNF QRP Resident-Level Quality Measure (QM) Report</p>	<p>Quality Measure</p>	<p>Resident/ Patient-Level Quality Measure</p>	<p>Lists each resident with a qualifying Minimum Data Set (MDS 3.0) record used to calculate the assessment-level quality measure values for a select 12-month period. The report displays each resident's name and indicates how/if the resident's stay affected the SNF's quality measure scores.</p>

iQIES Reports User Manual

	SNF QRP Review & Correct Report	Quality Measure	Review and Correct	Allows providers to review their QM data to identify if there are any corrections or changes needed to the assessment-based data prior to the quarter's data submission deadline, which is 4.5 months following the end of the reporting quarter. The report will provide a breakdown by measure and by quarter, of the SNF's assessment-based QM data for four rolling quarters. The report also identifies whether each quarter's data correction period is open or closed as of the report run date.
Payroll-Based Journal (PBJ)				
	Daily MDS Census Report	Payroll-Based Journal (PBJ)	Census	The Daily MDS Census Report provides the daily facility census counts and lists the IDs of the residents included in the daily census for one or more selected facilities.
S&C				
	Active Provider File Report	Provider	Active Provider File	Provides a list per care setting of all active providers for which the Report Name Report Category Report Type Report Purpose termination expiration date is null and termination code is active at the time the file is generated.
	Cases For Which No Letter Has Been Sent	Survey & Certification	Enforcement Reports	A list of enforcement cases in which no letter has been sent to date filtered and ordered by report filter selections, including, date range, facility and case type.

iQIES Reports User Manual

	CMPTS Accounts Receivable Report	Survey & Certification	Standard Reports	Displays the outstanding Civil Monetary Penalty (CMP) amounts due in iQIES for nursing home and home health agency providers. The data is broken down by fiscal year, CMS Location, and/or state and includes a summary at the national level.
	CMPTS Collections Report	Survey & Certification	Standard Reports	Displays collection information for select providers with Civil Monetary Penalty (CMP) payments made during the fiscal year or date range selected. Display output includes totals for the selected geographic area, by CMS Location or State.
	Complaint/Incident Investigation Report	Survey & Certification	Intake Module Reports	The report contains detailed information about the provider, intake, complainant(s), individuals involved, alleged perpetrators, allegations, and the investigation. It indicates whether deficiencies are linked to the investigation/complaint survey.
	Complaint/Incident Summary Report	Survey & Certification	Intake Module Reports	This report provides a summary of information for the public about the selected intake. This report does not include allegation details. It prints the Findings category for each allegation, but does not include findings text.
	Complaint/Incident Survey Report	Survey & Certification	Intake Module Reports	This report displays provider, survey, complaint/incident, allegation, and citation information for all intakes linked to the same investigation as the selected intake.
	Enforcement Case Log	Survey & Certification	Enforcement Reports	A list of enforcement cases filtered and ordered by report filter selections, including, date range, facility and case type, with a CDC case type option.

iQIES Reports User Manual

	ePOC Audit Trail Report	Survey & Certification	ePOC Reports	Displays all Plan of Correction (POC) activities for a provider by geographic area. It will include submissions, re-submissions, rejections, approvals, notes and the associated user.
	Facilities on a Termination Track	Survey & Certification	Enforcement Reports	Lists the certified facilities that are on a termination track. Report criteria available includes enforcement case results by geographical area, provider type, termination type, enforcement case status, enforcement case start date range, and deemed status.
	Facility Enforcement Case Profile Report	Survey & Certification	Enforcement Reports	Displays the currently selected Enforcement Case with the following information: Facility, Case Summary, Visit, IJ Situations, Remedies, Civil Money Penalty, Notice, NATCEP, Hearing, Case Workers, and Case Notes.
	Facility Enforcement History Report	Survey & Certification	Enforcement Reports	Lists a summary of all enforcement cases for the selected facility within a specified date range, including case dates, type and status, surveys, remedies and hearing information.
	Hospice Multidisciplinary Survey Team Report	Survey & Certification	Hospice Reports	Lists surveys in which no Registered Nurse was assigned to a survey team, including the disciplines assigned to the team. The report has three sections that show single surveyor teams with no Registered Nurse on the team, multi-surveyor teams in which no Registered Nurse was on the survey team, and multi-surveyor teams that are not multidisciplinary in team composition.

iQIES Reports User Manual

	Intake Information Report	Survey & Certification	Intake Module Reports	This report contains information about complaint(s)/incident(s): including intake and provider information such as the intake type, date received, individuals involved, complainant(s), alleged allegations, and other information associated with the intake.
	Intake Interval Report	Survey & Certification	Intake Module Reports	Shows the number of days interval between the Received End Date and the Investigation Due Date, for each intake. It also provides Survey Start and End Dates, and indicates Priority.
	Intake Notes Report	Survey & Certification	Intake Module Reports	This report displays the intake and provider information, including any supplementary notes entered about the complaint/incident. You can also choose which notes to display: Summary of Intake, Notes, or All.
	Mandatory DPNA Timeline	Survey & Certification	Enforcement Reports	Lists cases with Denial Payment for new Admissions (DPNA) remedies and the relevant data for denial of payment. Available filters include, time period, S/S range, case worker, and only cases within 14 days of 70th day.
	Name and Address Listing Report	Survey & Certification	Provider Reports	Displays a list of providers including their address and phone number. Report criteria available includes results by provider type, geographical area, deemed status, federal certification status, or current survey date range.
	NATCEP Loss Report	Survey & Certification	Enforcement Reports	Lists cases with Nurse Aide Training and Competency Evaluation Program (NATCEP) loss data, primary loss reason, effective date, last day of loss, state waiver effective date and CHOW restart date.

iQIES Reports User Manual

	Overdue Intake Investigations Report	Survey & Certification	Intake Module Reports	Displays a list of intakes that have either taken more than 10 days to triage or have a triage priority of IJ or Non IJ-High and do not meet their investigation timeframes established by the SOM Chapter 5, Section 5075.9. Report criteria available includes intake results by geographical area, provider type and includes the Intake Status, associated triage dates, applicable survey information, and the survey due date.
	Provider Count Report	Survey & Certification	Provider Reports	Displays the count of providers by provider category/sub-category and deemed status for the selected geographic area.
	Provider History Report	Survey & Certification	Standard Reports	This report lists the deficiencies cited on up to four of the provider's most recent surveys and up to three years of recent complaint surveys.
	Regulation Set Information Report	Survey & Certification	Regulation Set Reports	Provides a list of regulations in a given regulation set for HHA, ASC, or Hospice provider types. Users can download current or past federal or state regulation sets.
	Surveys Without an Enforcement Case	Survey & Certification	Enforcement Reports	Lists surveys not currently attached to an enforcement case. Report Criteria includes the ability to return surveys for a given geographical area, provider type, scope and severity, and date range based off of survey exit date

iQIES Reports User Manual

	Workload Report	Survey & Certification	Provider Reports	Generates a CSV summary of survey counts and total hours (pre-survey, on-site, travel, off-site, and overall) for the selected provider types. Surveys with a status of New or In Progress are excluded and surveys where the report run date is at least 70 days after the exit date are included.
--	------------------------	------------------------	------------------	---