Centers for Medicare & Medicaid Services

Internet Quality Improvement Evaluation System (iQIES)

iQIES Announcement and Notification System (iQAN)

Version 1.0

August 15, 2023

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1. Introduction

This user manual addresses the processes necessary to perform iQAN functions in iQIES.

1.1 Getting Started – Important Information to Know

Below is important general information about iQIES.

- Log in to iQIES at https://iqies.cms.gov/ with Health Care Quality Information Systems (HCQIS) Access Roles and Profile (HARP) login credentials. Refer to the iQIES Onboarding Guide for further information, if necessary.
- All screenshots included in this manual contain only test data. Current screens in iQIES may differ from what is shown in screenshots below.
- Words highlighted in blue are clickable links.
- A red asterisk (*) indicates a required field.
- Blank fields may have a limited number of characters allowed in that field. If so, the character limit is shown on the bottom left. The blank fields may also be expanded. Click the two 45° parallel lines and drag to the right to enlarge the box. See *Figure 1, Expandable Field*.

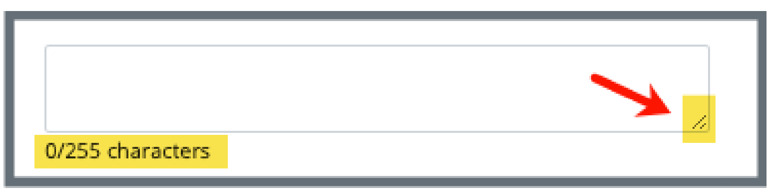

Figure 1: Expandable Field

- iQIES times out after 15 minutes of nonuse and reverts to the login page. Be sure to save data regularly. iQIES remains up and active as long as it is in use.
- iQIES uses a smart search. Once three letters/digits are typed in the search bar, results are shown based on the letters/digits entered. The more letters/digits entered, the narrower the search. If any of the results is the correct result, click the result to open.

- Review any yellow/orange notification banners. See *Figure 2, Notification Banner*. These banners can be closed (X'd out) if they do not apply or they are resolved.

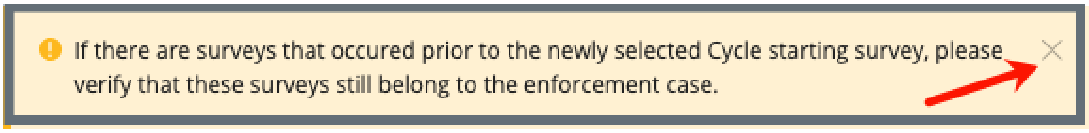

Figure 2: Notification Banner

- Review any Tool Tips for additional information to perform an action. Hover over the information icon to see the tip. Tool Tips are in iQIES to communicate information. Look for the information icon. See *Figure 3, Tool Tip Icon.*

Figure 3: Tool Tip Icon

- 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 in iQIES.

Assistance Accessing iQIES:	Contact the iQIES Security Official (SO) for your organization
Technical Support:	Contact the iQIES Service Center: **Phone**: 888-477-7876 (select Option 1) **Email**: iQIES@cms.hhs.gov
CCSQ Support Central:	Create a new ticket or track an existing ticket: https://cmsqualitysupport.servicenowservices.com/ccsq_support_central
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. iQIES reference materials include: • Links to Training Videos for providers • Assessment Management User Manual • Quick Reference Guides • Onboarding Guide • Managing User Information • Other helpful iQIES material

2. iQAN Overview

iQAN is a content delivery service in iQIES.

This manual explains how to create and send an email.

3. iQAN User Roles

Note: iQAN is only for CMS use. You must have a CMS General User (CMSGU) provider role prior to requesting an iQAN role.

There are three general iQAN user roles: **iQAN CLIA User**, **iQAN CLIA Admin**, and **iQAN Admin**. User roles are based on provider type. The iQAN Admin role is for all provider types.

Please contact iQIES@cms.hhs.gov with the subject **iQAN New User Roles**, to request additional provider user roles.

iQAN CLIA User: Authorized CLIA user.

Access iQAN bulk messaging functionality.

iQAN CLIA Admin: Authorized CLIA administrators.

Access and manage iQAN bulk messaging functionality and reporting.

iQAN Admin: Authorized iQAN administrators.

Access and manage all iQAN functionality for all provider types.

4. Request iQAN role

Note: iQAN is for a CMS General User role only.

4.1 Log into iQIES.

4.2 Click the caret next to the user name in the top right menu.

4.3 Click **Request User Role** from the drop-down menu under user name. See *Figure 4, Request User Role*. The **Select a User Category** window opens.

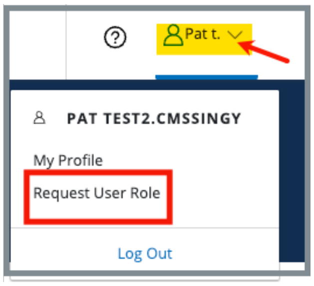

Figure 4: Request User Role

4.4 Select **CMS**. See *Figure 5, Select a User Category*.

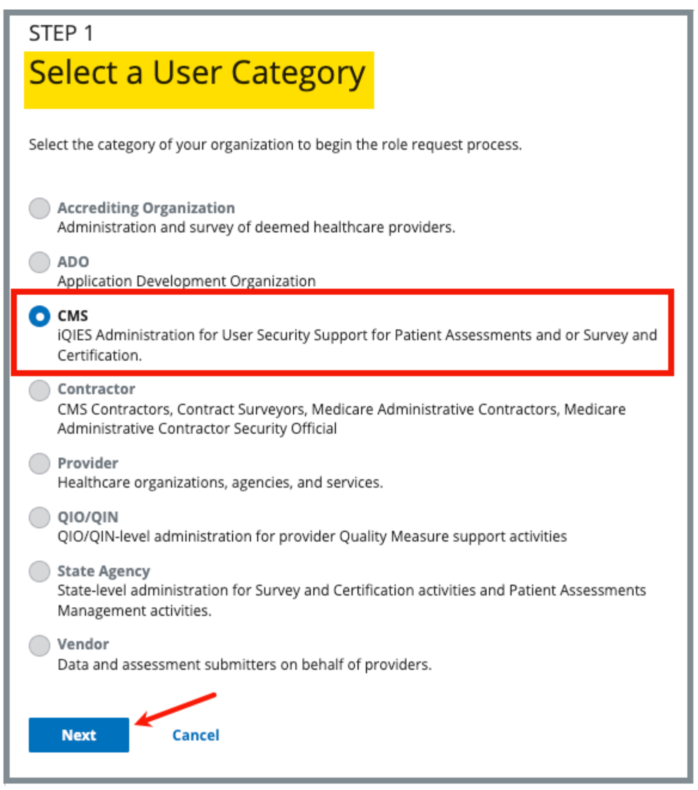

Figure 5: Select a User Category

4.5 Click **Next**. The **Select a User Role** window opens. See *Figure 6, Select a User Role*.

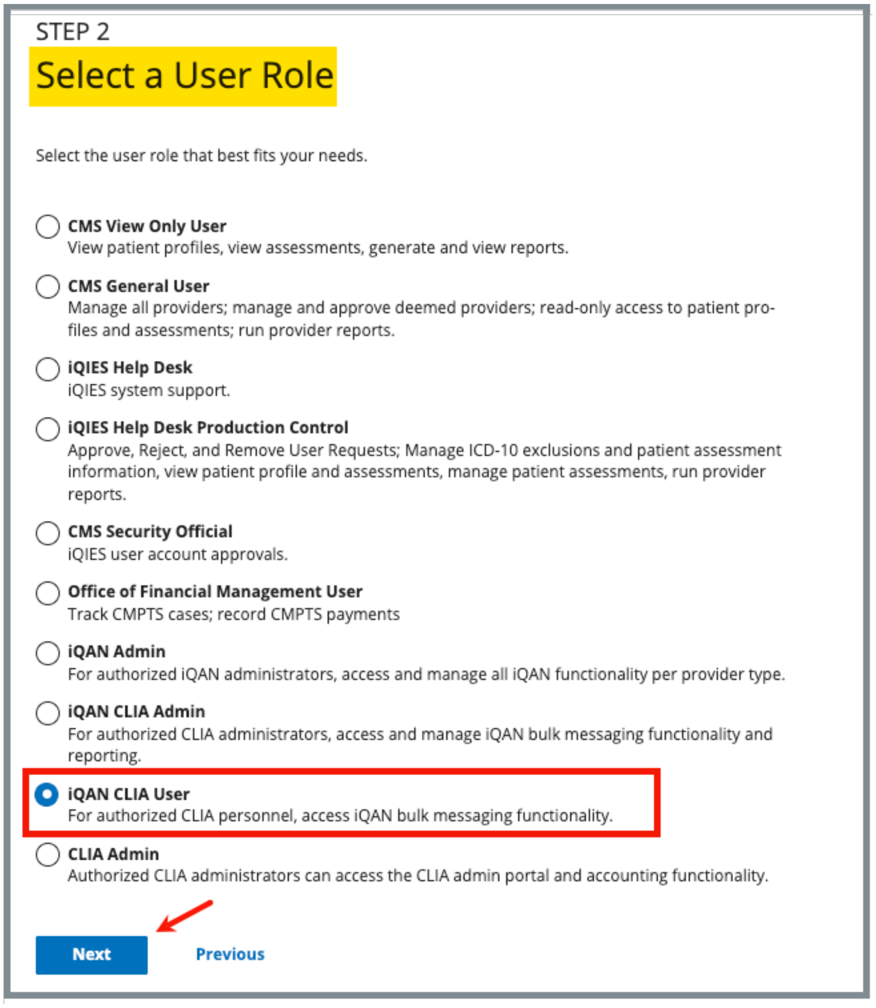

Figure 6: Select a User Role

4.6 Select **iQAN CLIA User**.

4.7 Click **Next**. The **Add Organizations** window opens. See *Figure 7, Add Organizations*.

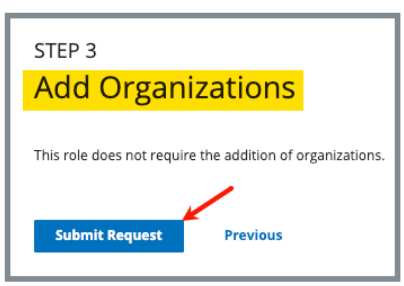

Figure 7: Add Organizations

4.8 Click **Submit Request**.

4.9 Verify the **Role Request Submitted** green notification bar appears on the top of the page. See *Figure 8, Role Request Submitted Notification Bar and Pending Requests.*

Notes:

- The pending request appears under **Pending Requests** at the bottom of the screen.
- The role must be approved by the SO. Approval can take up to several days. For more information on user roles, refer to the iQIES User Roles Matrix.
- Once the role is approved, the **iQAN** selection will be in the drop-down list under **Administration** on the top menu. See step 5, iQAN Dashboard.

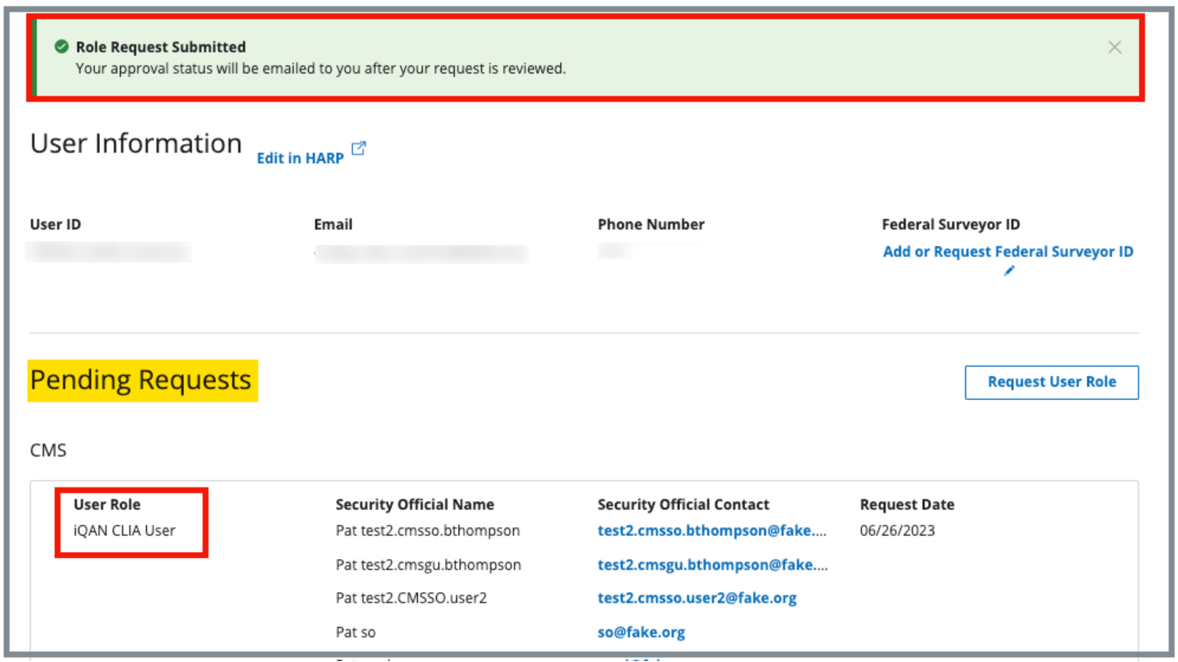

Figure 8: Role Request Submitted Notification Bar and Pending Requests

5. iQAN Dashboard

5.1 Dashboard Landing Page

Click **iQAN** under **Administration** on the top menu. See *Figure 9, iQAN Administration*. The iQAN dashboard opens. See *Figure 10, iQAN Dashboard.*

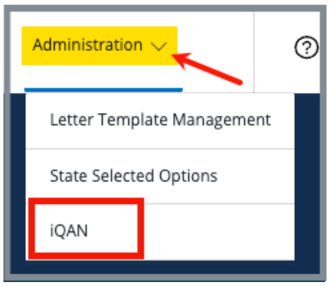

Figure 9: iQAN Administration

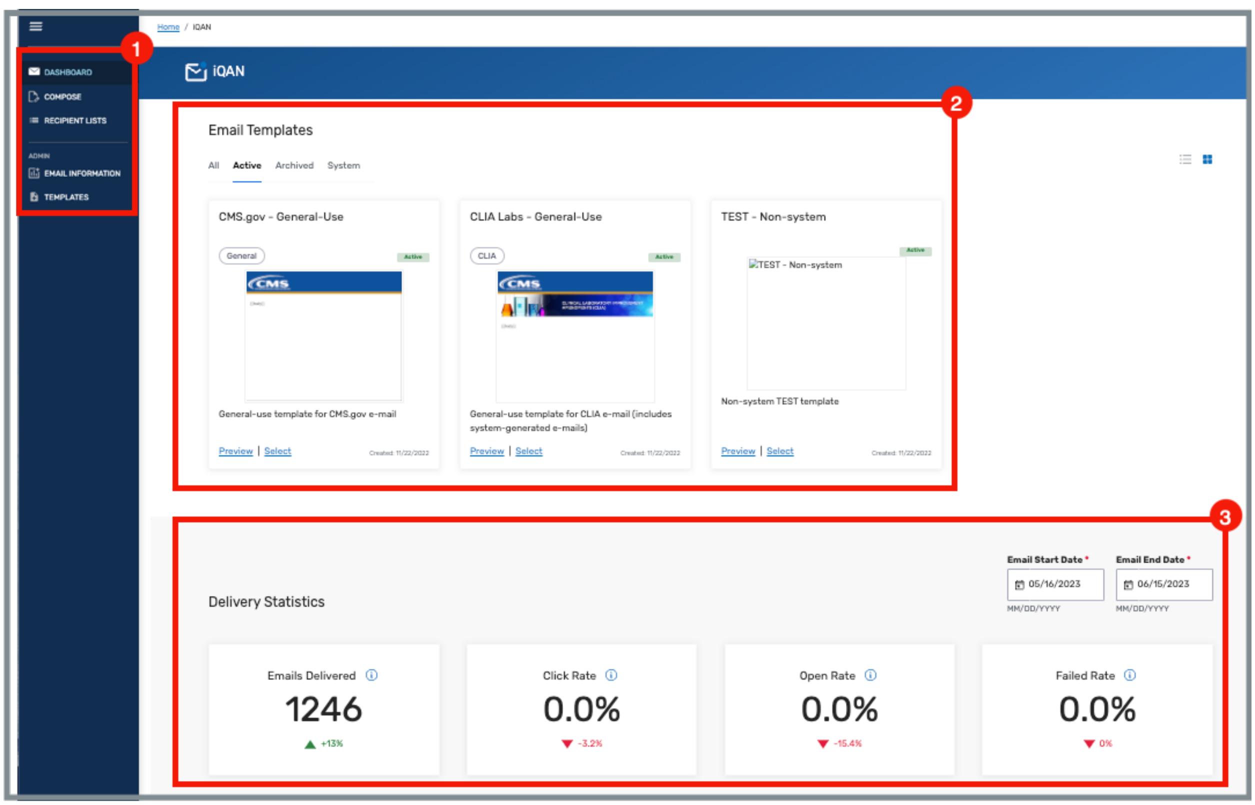

Figure 10: iQAN Dashboard

Note: See Detailed Dashboard Information for detailed information on each of the three callouts on this figure.

5.2 Detailed Dashboard Information

Note: The complete dashboard figure is located in the Dashboard Landing page step. The following are callout details from that figure.

5.2.1 Left Menu Callout 1

Note: See *Figure 11, iQAN Dashboard Left Menu Callout 1* and *Table 1, iQAN Dashboard Left Menu Callout 1 Details.*

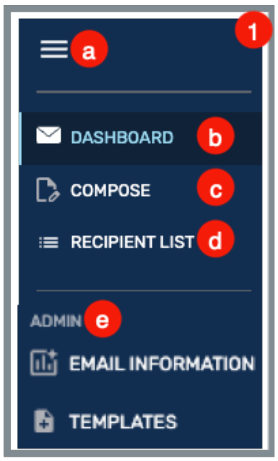

Figure 11: iQAN Dashboard Left Menu Callout 1

Table 1: iQAN Dashboard Left Menu Callout 1 Details

Callout	Detailed Explanation
a	Horizontal ellipsis (hamburger). Opens and shuts the left menu.
b	Click **DASHBOARD** to open the iQAN dashboard. This is the default view.
c	Click **COMPOSE** to compose an email.
d	Click **RECIPIENT LISTS** to see the recipient list.
e	Click **EMAIL INFORMATION** to review sent emails. Click **TEMPLATES** to create, update or edit a template. **Note**: These actions are only available to **Admin** users and are not shown on the general user role.

5.2.2 Email Templates Callout 2

Notes:

- Only the **Admin** user roles can create a template.
- All templates must be approved by CMS before use. Template approvals are not part of iQAN.
- A template must be published before it is available for use.
- System templates cannot be modified. System templates are created in collaboration with the iQAN team for use in automation workflows.
- See *Figure 12, iQAN Dashboard Email Templates Callout 2* and *Table 2, iQAN Dashboard Email Templates Callout 2 Details*.

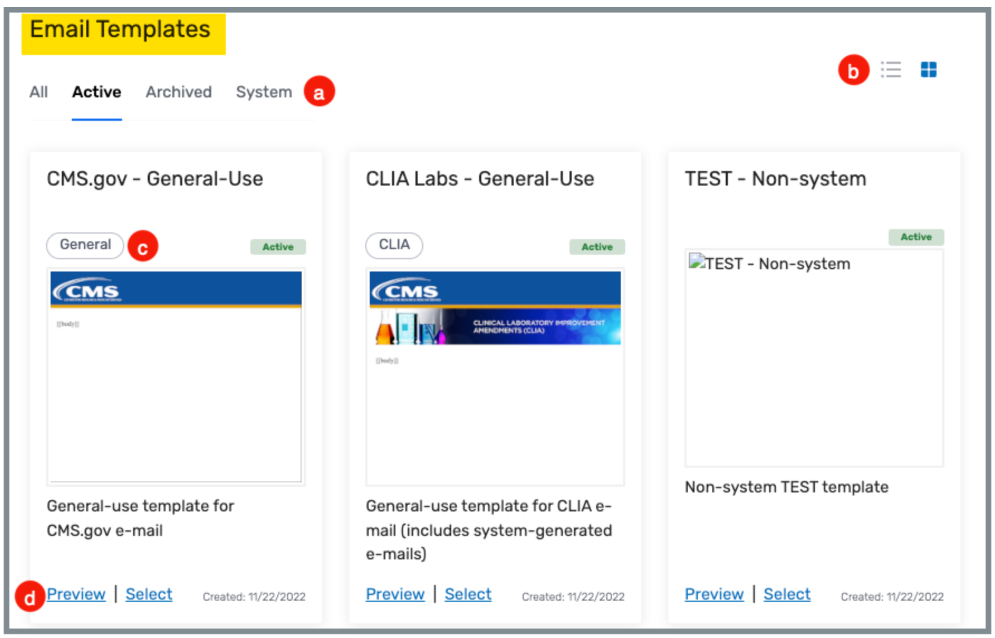

Figure 12: iQAN Dashboard Email Templates Callout 2

Table 2: iQAN Dashboard Email Templates Callout 2 Details

Callout	Detailed Explanation
a	**Note**: Only **Admin** user roles can view all four tabs. All other user roles see only the **Active** tab. The **Active** tab shows existing templates for use. The iQAN Admin user role can view archived and system templates.
b	Click the left list icon to view the templates in a detailed list. Click the right icon to view the templates as a gallery. This is the default view. The highlighted icon is the icon in use. iQAN defaults to the gallery view.
c	Each template has one provider type tagged. • The template is available for that provider type only. • The provider type is **General** when the template needs to be made available for more than one provider type. • A **General** tag allows all users to use that template.
d	Click **Preview** to preview the template. Click **Select** to select that template to use. The template opens immediately for use. **Preview** and **Select** appear under the **Actions** menu in the detailed list view.

5.2.3 Delivery Statistics Callout 3

Delivery Statistics are system-wide statistics for the selected time period. See *Figure 13, iQAN Dashboard Delivery Statistics Callout 3* and *Table 3, iQAN Delivery Statistics Callout 3 Details*.

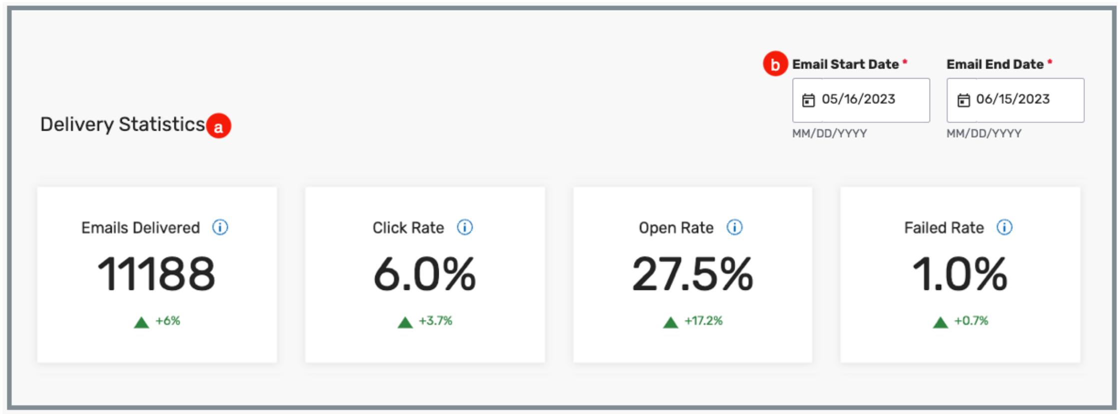

Figure 13: iQAN Dashboard Delivery Statistics Callout 3

Table 3: iQAN Dashboard Delivery Statistics Callout 3 Details

Callout	Detailed Explanation
a	**Delivery Statistics** show detailed information on: • Percentage of emails delivered to the recipient • Percentage of emails whose attached links were selected • Percentage of emails opened by a recipient • Percentage of emails that were not delivered The triangles below the number/percentage shows the trending percentage up or down.
b	Type the start/end date to view detailed statistics for a specific time period.

6. Compose an Email

Purpose: To create an email to send to a recipient list

Note: Templates are provider specific. The provider can only see provider-specific templates. General templates are available to all users.

6.1 Click **COMPOSE** on the left menu. See *Figure 14, Compose*. The **Compose/Email Details** window opens.

Note: Click **Select** on any template to compose an email directly from the dashboard. The **Compose** window opens with the **Email Template** filled in.

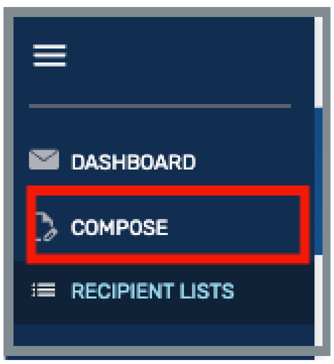

Figure 14: Compose/Email Details

6.2 Fill out the information under **Email Details** tab. See *Figure 15, Email Details Callouts and Table 4, Email Details, Callout Details Explanation.*

Note: Select **Email Template** first. Email addresses are removed when the template is selected after email addresses are added.

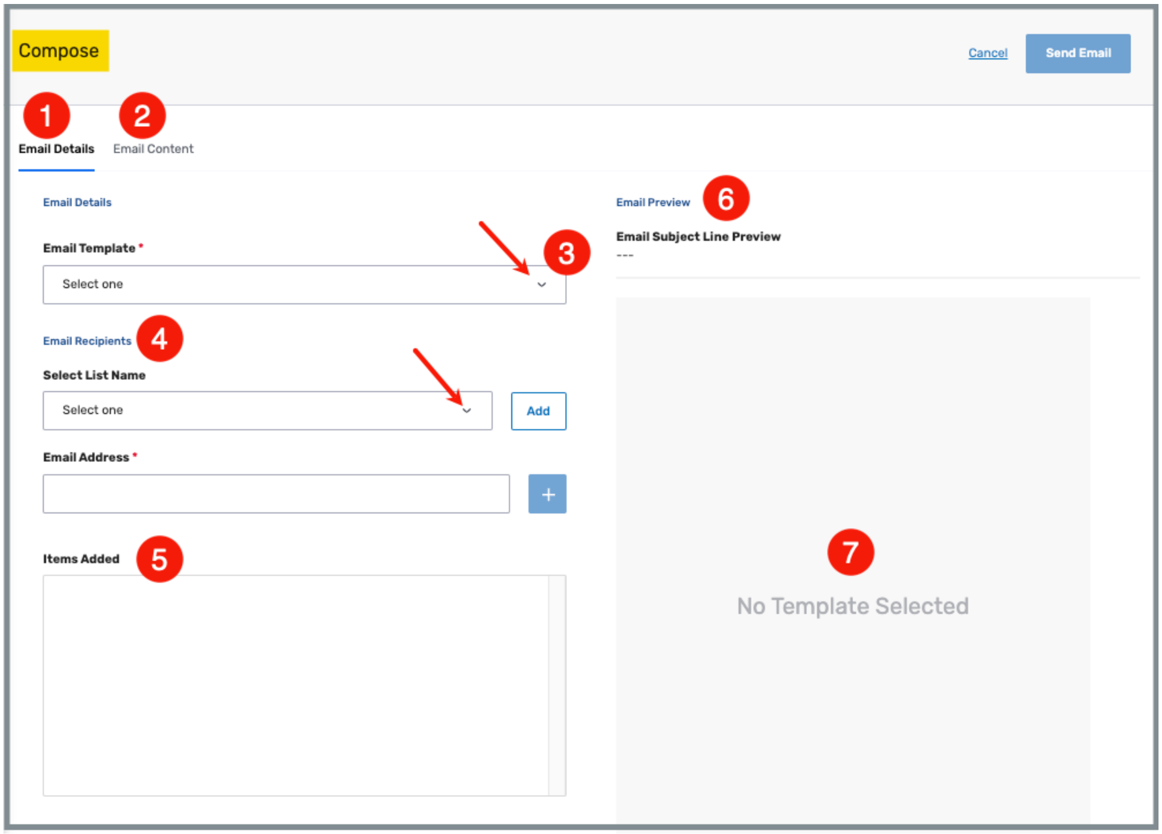

Figure 15: Email Details Callouts

Table 4: Email Details Callout Details Explanation

Callout	Detailed Explanation
1	**Email Details:** Select this tab for email template header and recipient information.
2	Email Content: Select this tab for email subject and content information.
3	**Email Template**: Select an existing template from the drop-down list. **Note**: The template name shows directly under **Email Template** when a template is selected from the dashboard.

4	**Email Recipients:** Select an existing email list from the drop-down menu under **Select List Name** or type email address under **Email Address**. **Notes:** • Multiple email addresses can be added. Separate emails with a comma. Do not include a space after the comma. Start directly with the new email. For example: leonardo@davinci.com,m.lisa@davinci.com • Duplicate email addresses are removed by the system. Click **+** to add the email or emails.
5	The added emails are shown in the **Items Added** box. The number in parentheses is how many email addresses have been added.
6	**Email Preview** shows the template selected, the email subject, and the email written. If nothing has been written yet, then nothing will show.
7	This area shows the template selected. In the example above, no template was selected, so there is no information.

6.3 Click the **Email Content** tab. See *Figure 16, Email Content Callouts.*

Note: There are templates that require no additional content. In that case, a blue notification opens in the Email Content tab and notes that the email will be sent with no additional input. See *Figure 17, No Inputs Required Notification.*

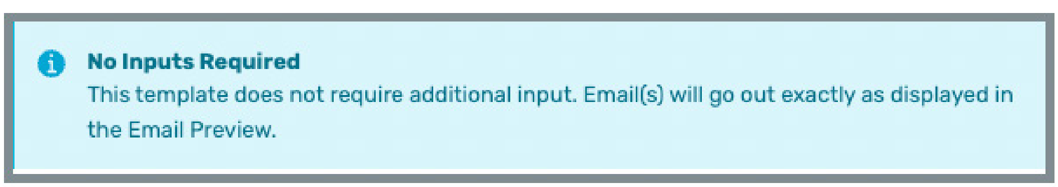

Figure 16: No Inputs Required Notification

6.4 Fill out the information under **Email Content** tab. See *Table 5, Email Content Callout Details Explanation.*

Notes:

- Some templates have content that must be filled out. For more information on those templates, see Example of a Completed Template with Fillable Fields.
- Links can be included in any email.
- Images can be copied and pasted in any email. Be aware that an image cannot be sent by itself; there must be written email content as well.

  Ctrl + **C** on the keyboard = Copy an image

  Ctrl + **V** on the keyboard = Paste an image

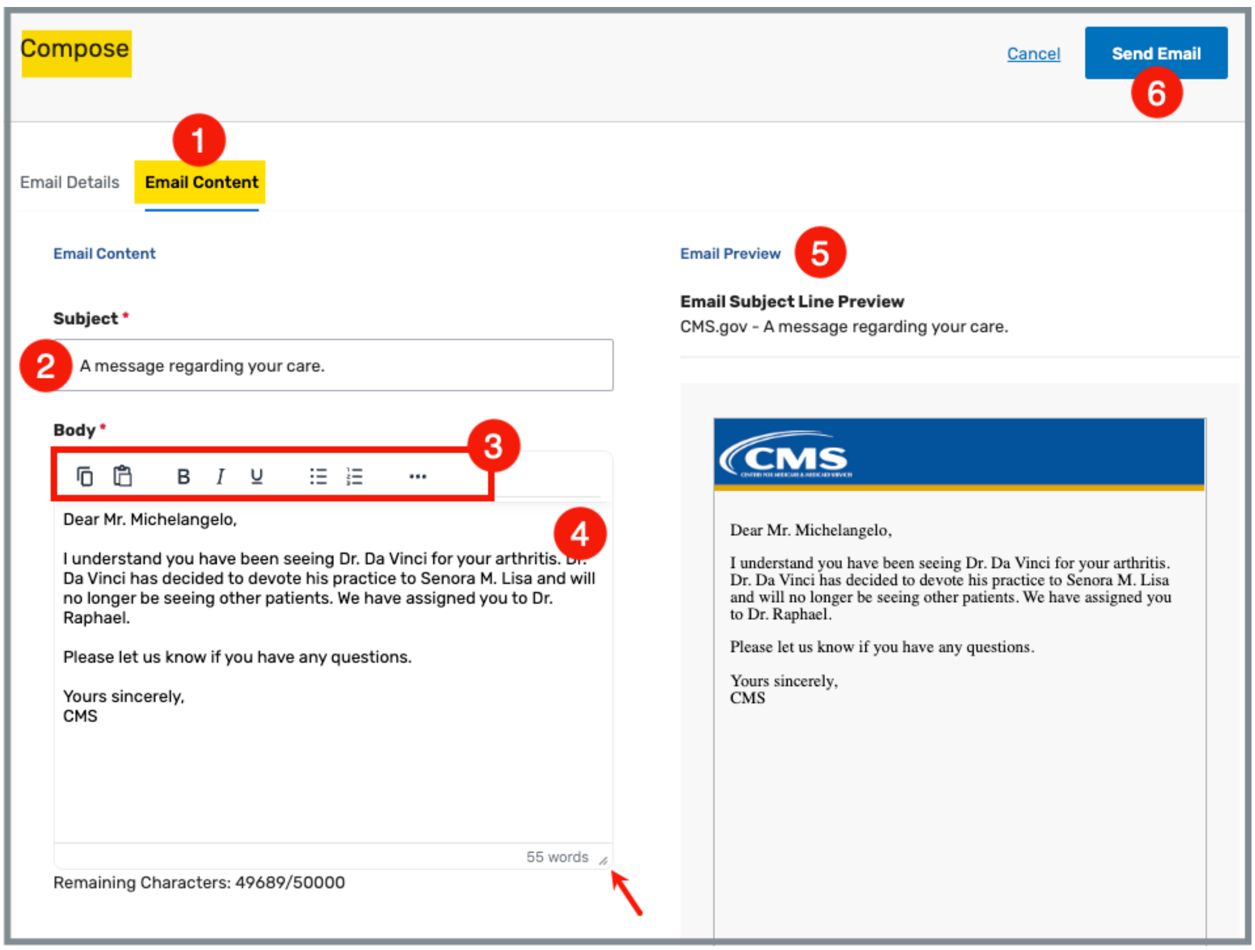

Figure 17: Email Content Callouts

Table 5: Email Content Callout Details Explanation

Callout	Detailed Explanation
1	**Email Content:** Select this tab to fill out the content of the email.
2	**Subject**: The subject is dependent on the template chosen and is automatically filled. The subject line can be updated, depending on the template chosen.
3	**Edit controls**: Hover over the edit controls to see the tool tip. Select the horizontal ellipsis to see more controls. **Note**: The ellipsis only shows when the screen is a reduced size. If there is no ellipsis, all the commands are shown.
4	**Body**: Type the email, if applicable. Drag the bottom right of the field to expand the area in which to write, if desired. The body of the email can be updated, depending on the template chosen.
5	**Email Preview:** Preview the email. **Note:** Nothing can be updated in the preview area. Return to the left side of the screen to make any updates.
6	Click **Send Email** to send the email.

6.5 Click **Send Email**. The **Confirm Send** pop-up window opens. See *Figure 18, Confirm Send Pop-Up Window.*

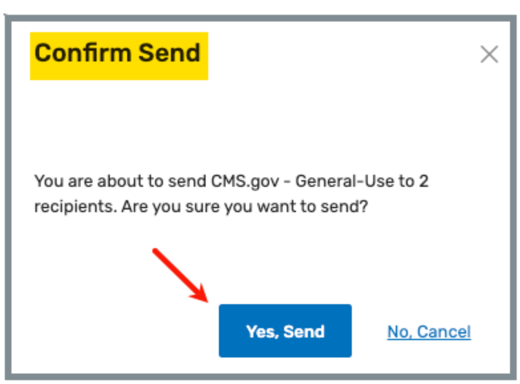

Figure 18: Confirm Send Pop-Up Window

6.6 Click **Yes, Send**.

6.7 Verify the green notification bar appears on the top of the screen that says **Successfully sent to [number] recipients**. See *Figure 19, Successfully Sent Notification Bar.*

Figure 19: Successfully Sent Notification Bar

7. Recipient Lists

Purpose: Recipient Lists are email distribution lists. When there is a group of people to whom emails are regularly sent, it saves time to create a list to use when necessary.

Notes:

- Templates are only available for Admin roles.
- Recipient lists are limited to the provider type only. Only the iQAN Admin role can create recipient lists for general use.

7.1 Create a Recipient List

7.1.1 Click **RECIPIENTS LISTS** on the left menu. See *Figure 20, Recipient Lists Left Menu.* The **Recipient Lists** window opens. See *Figure 21, Recipients List Callouts* and *Table 6, Recipient List Callouts Detailed Explanation*.

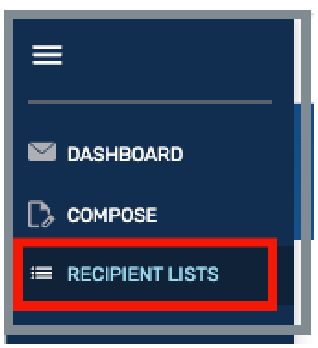

Figure 20: Recipient Lists Left Menu

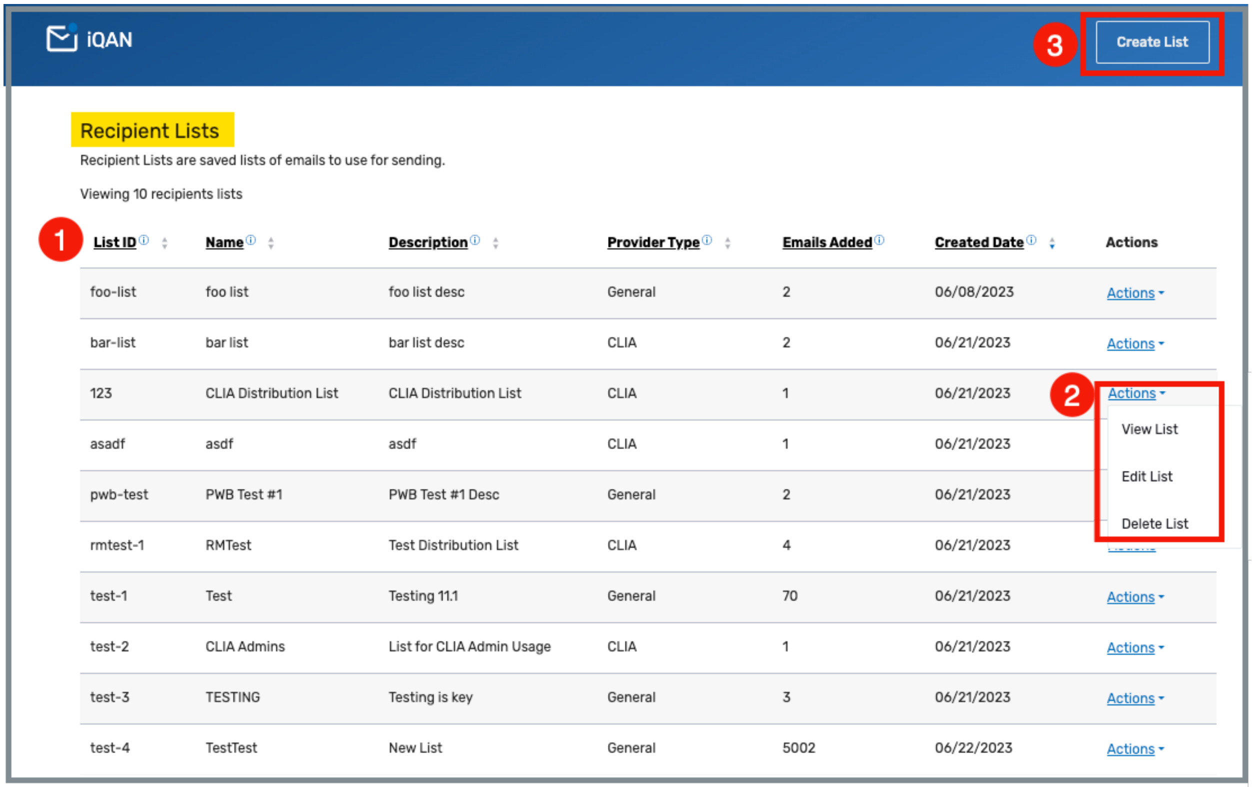

Figure 21: Recipients Lists Callouts

Table 6: Recipient Lists Callout Details Explanation

Callout	Detailed Explanation
1	Each heading shows detailed information about the recipient list. The headings can be sorted by clicking the arrows to the right of each heading.
2	Click the **Actions** drop-down menu to view the list of emails, edit the list of email (add, delete, update) or delete the list. • **Admin roles** have a choice of three actions: **View List**, **Edit List**, **Delete List**. • User roles can only see **View List**.
3	Click **Create List** to create a new list.

7.1.2 Click **Create List** to create a new list. The **Create New Recipient List** window opens. See *Figure 22, Create New Recipient List.*

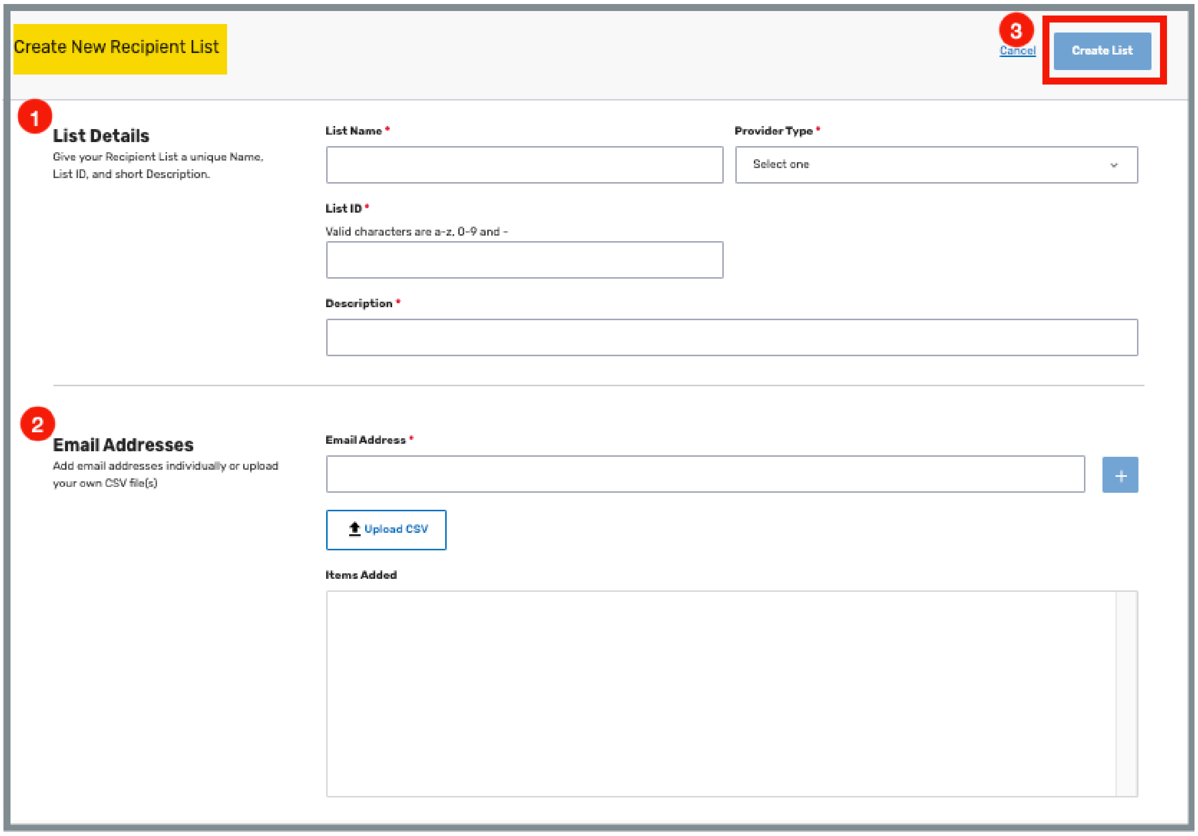

Figure 22: Create New Recipient List

7.1.3 Fill out the information. See *Table 7, Create New Recipient List Callout Details Explanation.*

Table 7: Create New Recipient List Callout Details Explanation

Callout	Detailed Explanation
1	**List Name** The name of the list **Provider Type** Select from drop-down menu, if possible. The selection may be automatic, depending on the user role. **List ID** Create a unique list ID using letters and numbers, but no special characters **Description** Type a description of the list
2	Type each email address, then click **+**. Each email is added to the **Items Added** section. **Notes**: • Click **Upload CSV** to upload a prepared email list. Prepared lists must have one email per line with no additional content, such as actual user name, and must be in one column, not numerous columns. The first row of the prepared email list can be a header row. • Multiple email addresses can be added, but each one must be separated by a comma. Do not include a space after the comma. Start directly with the new email. For example: leonardo@davinci.com,m.lisa@davinci.com
3	Click **Create List** to create the list.

7.1.4 Click **Create List**. The **Recipients Lists** window opens with the newly-created recipient list.

7.2 Edit a Recipient List

7.2.1 Select **Edit List** under the **Actions** drop-down menu. See Callout 2 in step 7.1.1. The Edit Recipient List window opens. See *Figure 23, Edit Recipient List Window.*

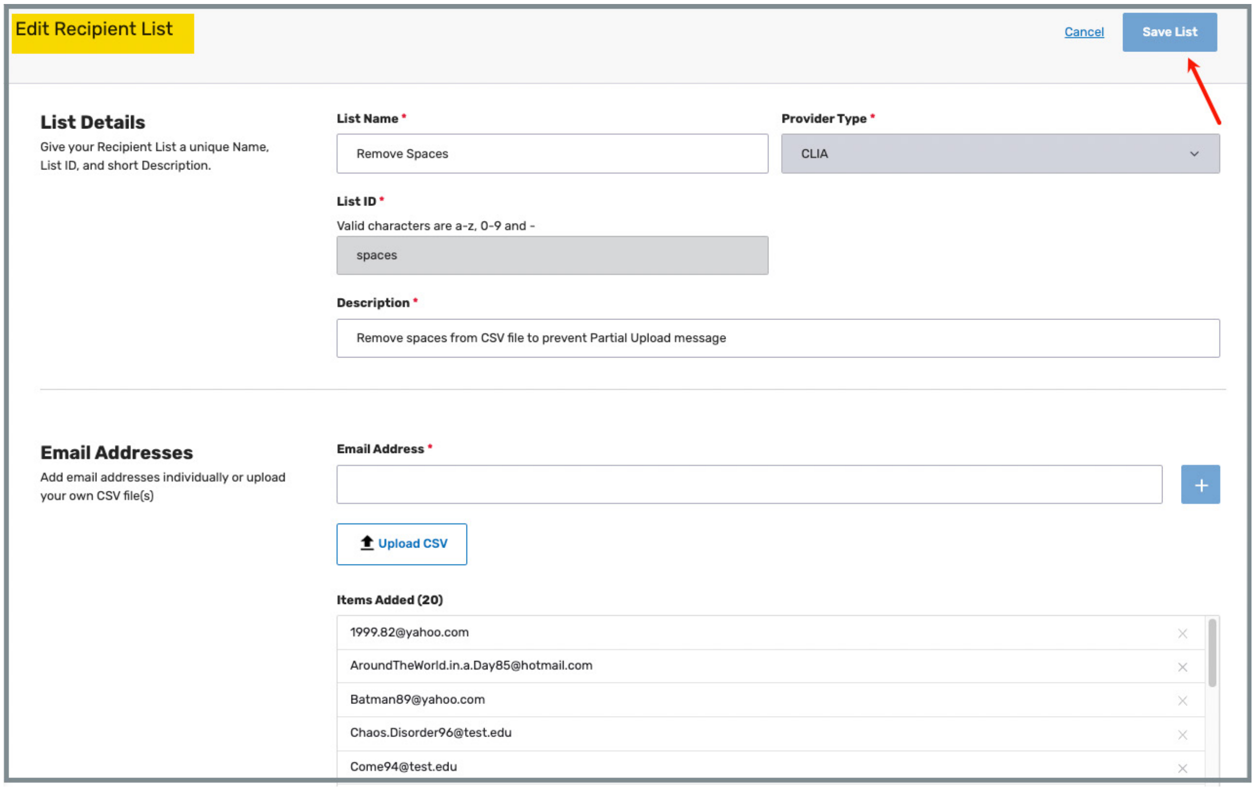

Figure 23: Edit Recipient List Window

7.2.2 Edit any desired details.

Notes:

- Fields that are greyed out cannot be changed.
- Click the **X** next to the email address to remove an email address.
- Click **Upload CSV** to upload an additional CSV.
- Click the **+** to add an email address.

7.2.3 Click **Save List**. The **Recipient Lists** window opens. Verify the **Successfully updated recipient list** green notification banner appears. See *Figure 24, Successfully Updated Notification.*

Figure 24: Successfully Updated Notification

7.3 Delete a Recipient List

7.3.1 Select **Delete List** under the **Actions** drop-down menu. See Callout 2 in step 7.1.1. The **Delete [Recipient List Name]** pop-up window opens. See *Figure 25, Delete Recipient Pop-Up Window.*

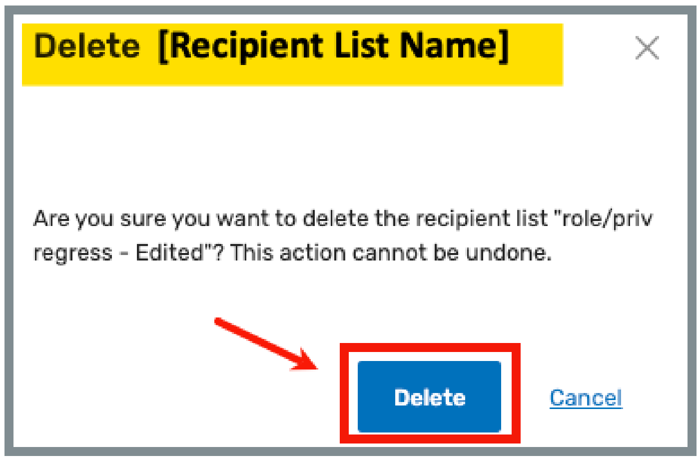

Figure 25: Delete Recipient Pop-Up Window

7.3.2 Click Delete. The **Recipient Lists** window opens. Verify the **Successfully deleted recipient list** green notification banner appears. See *Figure 26, Successfully Deleted Notification.*

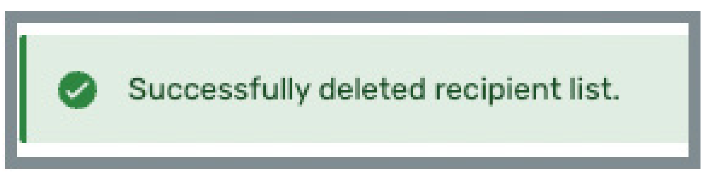

Figure 26: Successfully Deleted Notification

8. Templates

Purpose: To create, publish, edit, delete, archive, and duplicate a template.

Notes:

- This function is only available for the **User Admin** and **iQAN Admin** roles.
- There are two kinds of templates: Provider-specific and General. The provider can only see provider-specific templates. General templates are available to all users.
- General templates can only be created by the **iQAN Admin** role.

8.1 Create a Template

8.1.1 Click **TEMPLATES** on the left menu. See *Figure 27, Templates Left Menu.* The **Email Templates** window opens. See *Figure 28, Email Templates Callouts* and *Table 8, Email Templates Callouts Detailed Explanation*.

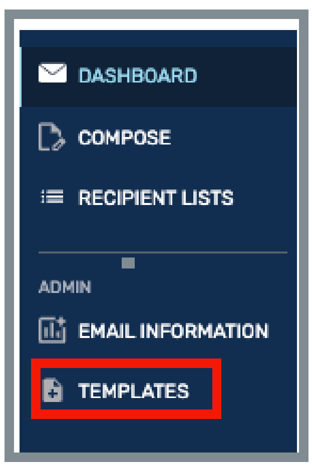

Figure 27: Templates Left Menu

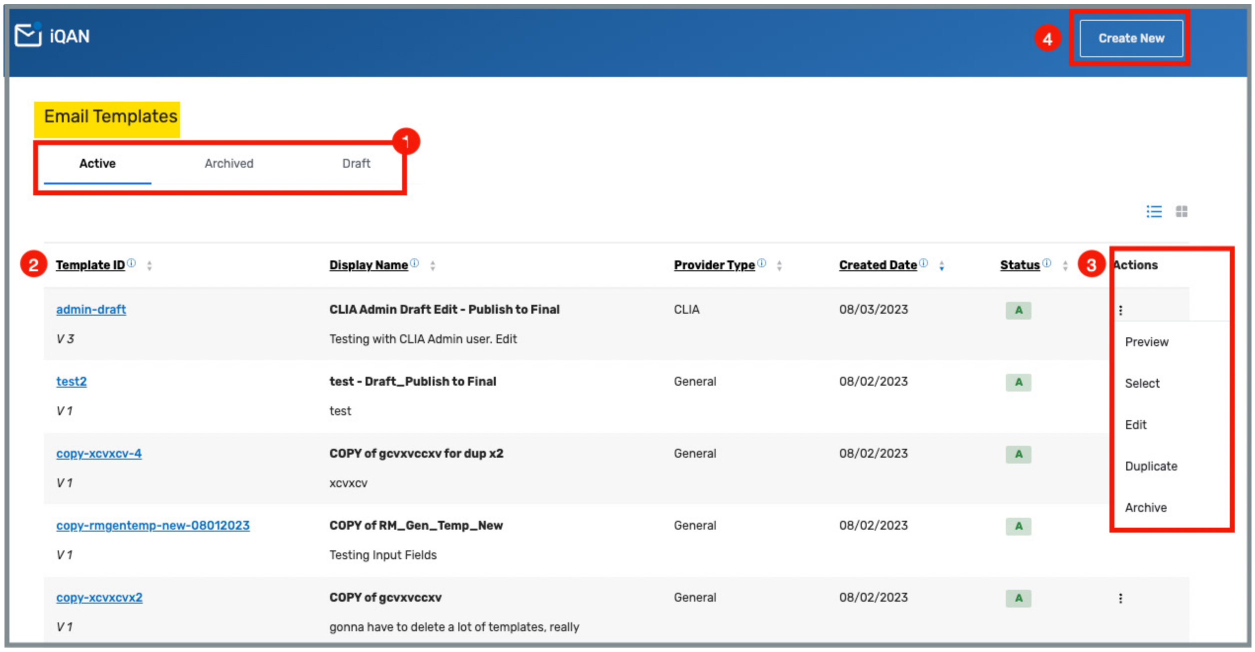

Figure 28: Email Templates Callouts

8.1.2 Click the links in the table below to find out detailed information on that callout.

Table 8: Email Templates Callout Details Explanation

Callout	Detailed Explanation
1	Click each tab to view active (**A**), archived (**Ar**), or draft (**D**) templates. Only **Active** templates can be used, but all templates can be updated.
2	Each heading shows detailed information about the email templates. The headings can be sorted by clicking the arrows to the right of each heading. Click the information button next to the column heading to find out further information about each column.
3	Click the **Actions** drop-down menu to preview, select, edit, duplicate or archive a template.
4	Click **Create New** to create a new template.

8.1.3 Click **Create New** to create a new template. The **Create Email Template** window opens. See *Figure 29, Create Email Template.*

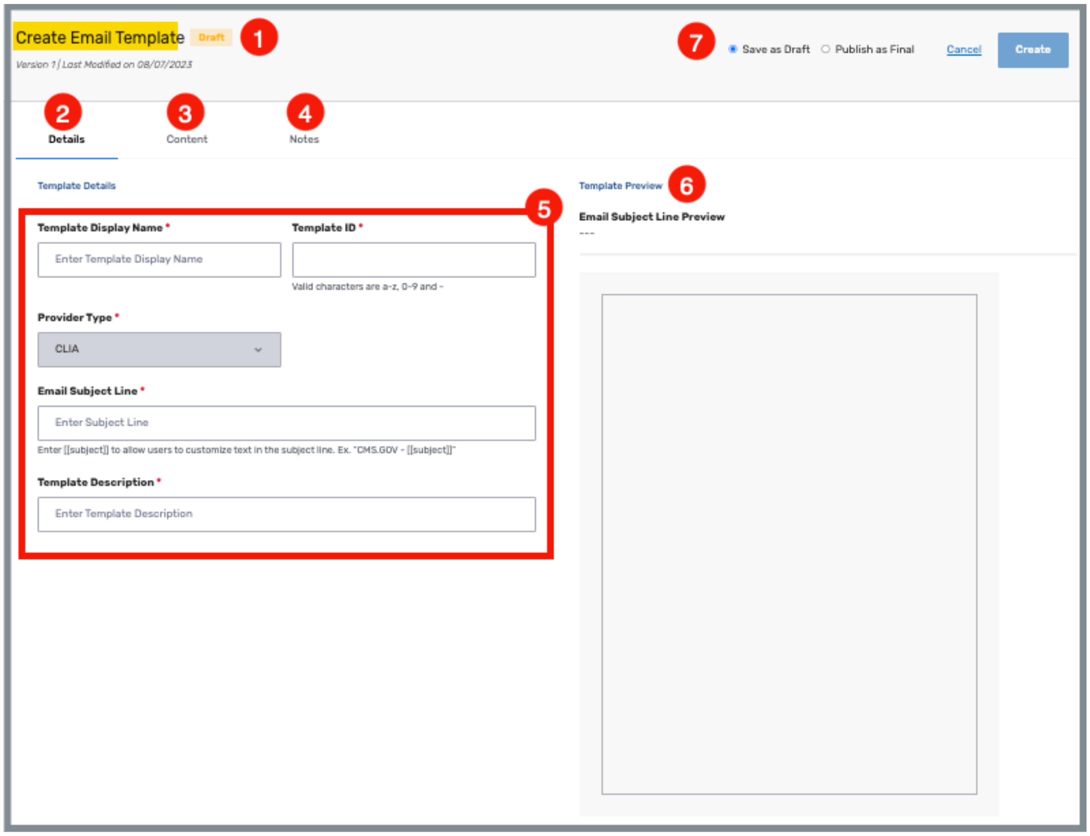

Figure 29: Create Email Template

8.1.4 Fill out the information. See *Table 9, Create Email Template Callout Details Explanation.*

Table 9: Create Email Template Callout Details Explanation

Callout	Detailed Explanation
1	Shows the status of the template: **Draft, Active,** or **Archived**.
2	**Details**: Select this tab for template header information
3	**Content**: Select this tab to create the content of the template
4	**Notes**: Select this tab to add any pertinent notes, if desired.
5	These fields help provide information on the template so it can be easily found. All fields are required. **Notes**: • The **Template ID** is created by the user. • The **Template ID** must be unique. • Do not use capital letters for the **Template ID**. • The **Provider Type** is greyed out when there is no choice available.
6	Shows a preview of the email. It is blank until the content is created.
7	Select **Save as Draft** or **Publish as Final**, as desired. Click **Create** to create the template.

8.1.5 Click **Content** tab. See *Figure 30, Template Content Tab.*

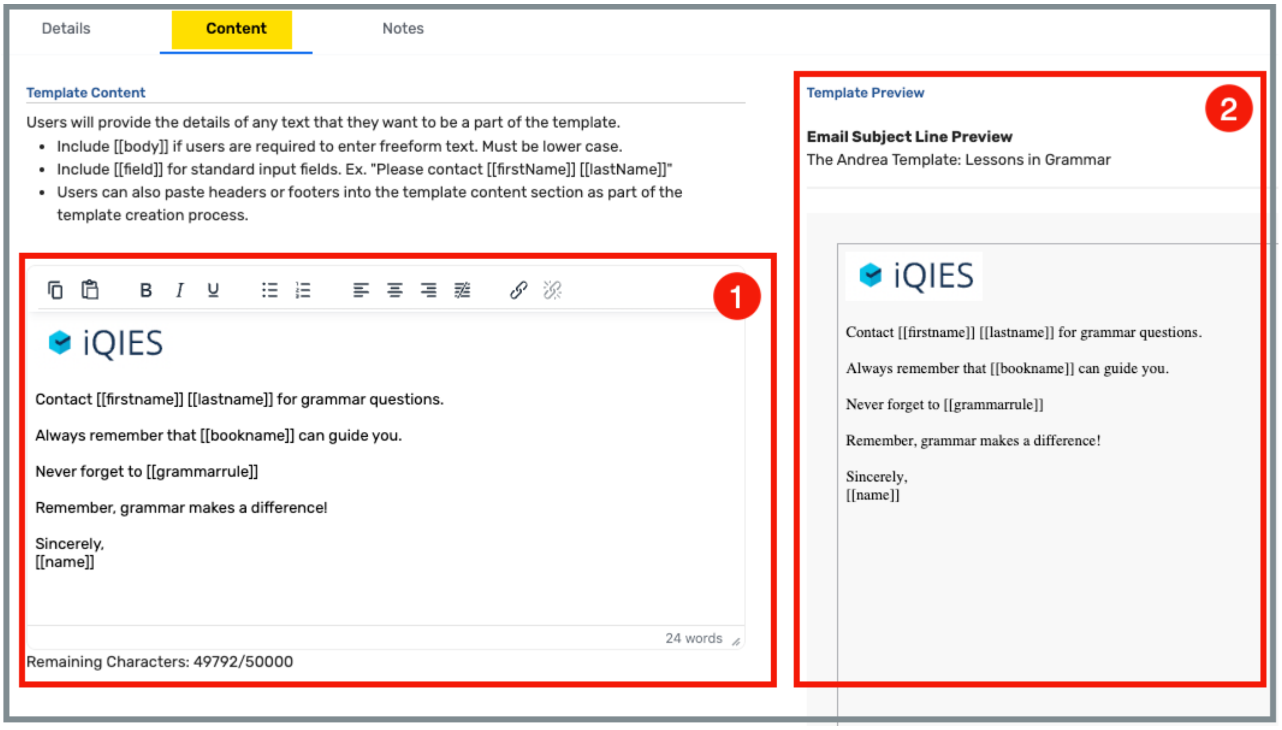

Figure 30: Template Content Tab

8.1.6 Create the content. See *Table 10, Template Content*.

Table 10: Template Content

Callout	Detailed Explanation

1	• Content can be as simple as a header (for example, a logo) or a footer (for example, contact information) or can be a complete email.
	• Images can be pasted into the content.
	• Links can be added. Highlight the text and clink the link icon. A popup opens and details can be added.
	• Basic formatting (bold, italics, underline, bullets, numbers, justification) of the email is available.
	• To create a field to be filled out when the template is used:
	  ○ Use lowercase letters for all field names.
	  ○ Type **[[body]]** for freeform text. Text can be added under **Email Content** tab when the email is created.
	  ○ Type field name for standard input fields. For example, type **Dear [[firstName]] [[lastName]]**.

2	Verify the content under **Template Preview.**

Note: See *Figure 31, Example of a Completed Template with Fillable Fields* for an example of a completed template.

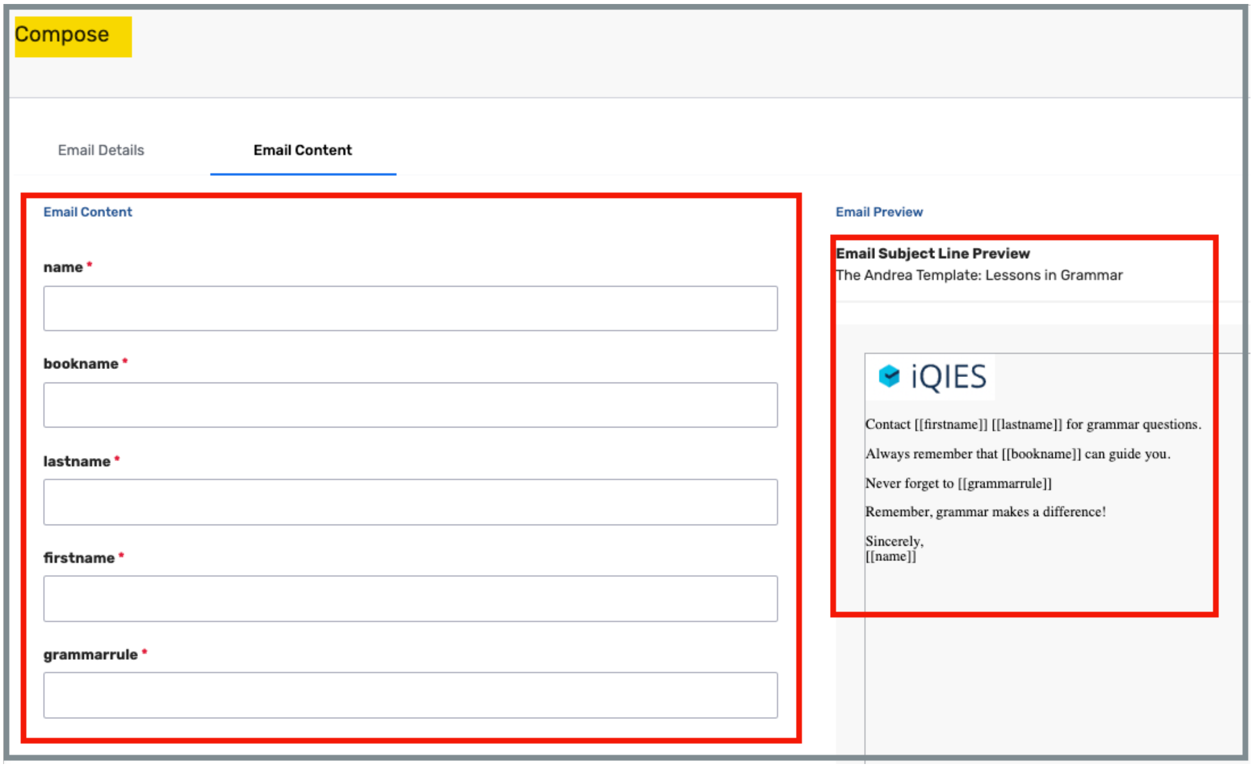

Figure 31: Example of a Completed Template with Fillable Fields

8.1.7 Add notes, if desired. Click the **Notes** tab. See *Figure 32, Notes Tab*.

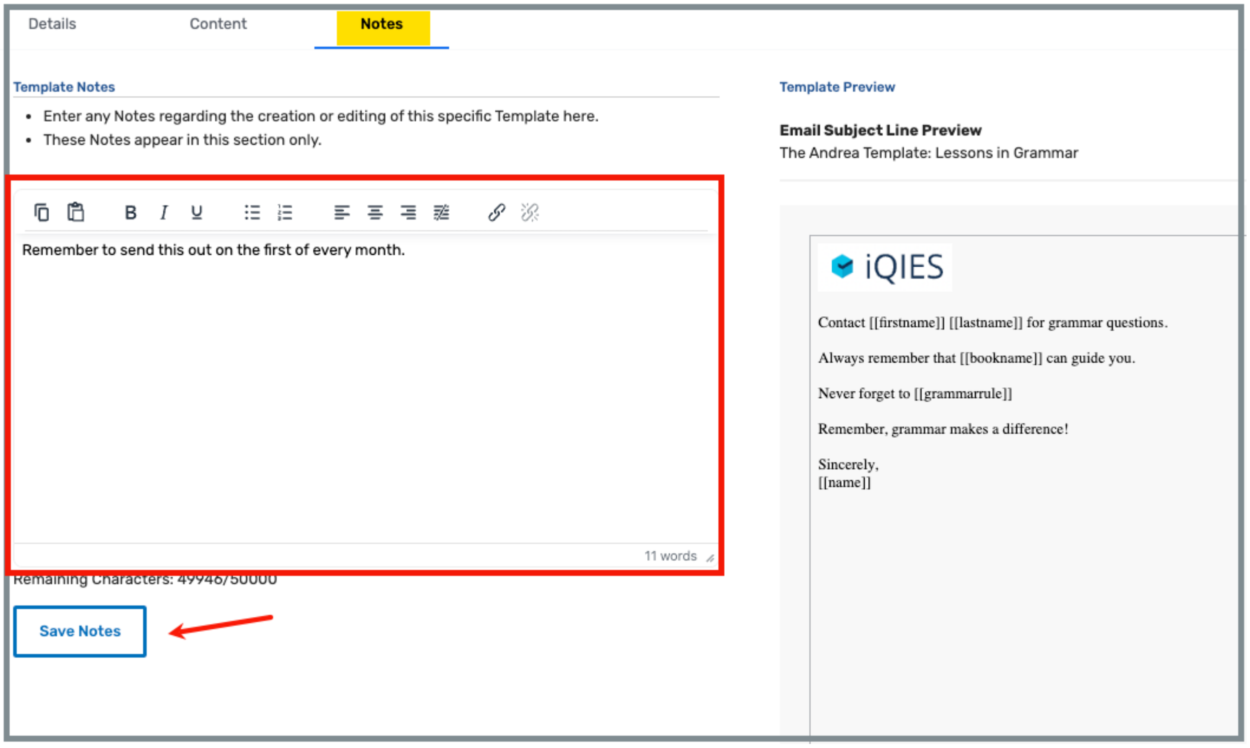

Figure 32: Notes Tab

8.1.8 Click **Save Notes**. The note is saved and the screen remains the same.

8.2 Publish Template or Save as a Draft

8.2.1 Click **Save as Draft** to save template as a draft. Click **Publish as Final** to publish the template for provider-specific use. See *Figure 33, Save.*

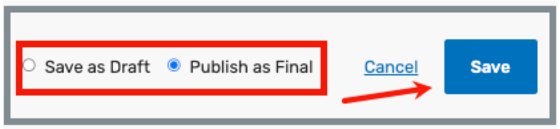

Figure 33: Save

8.2.2 Verify **Successfully created template** banner shows and the new template is listed in the correct tab. See *Figure 34, Successfully Created Template.*

Note: The arrow in the figure below points to the version control of the template. Each time the template is updated, the version number updates. Version control only starts with publication, i.e., documents in draft form all have V1 until published.

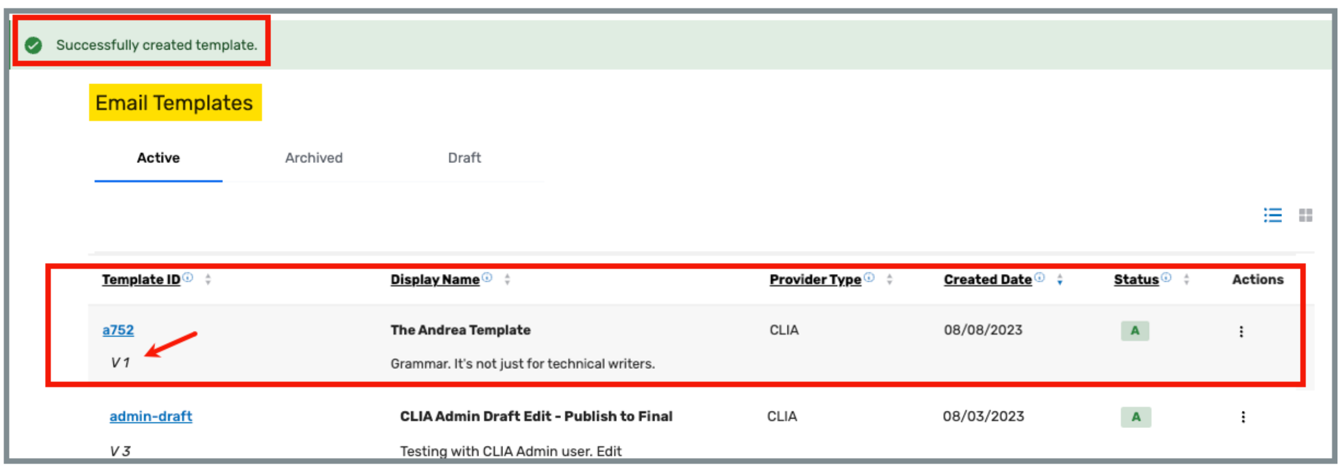

Figure 34: Successfully Created Template

8.3 Edit a Template

8.3.1 Select **Edit** under the **Actions** drop-down menu next to the template that needs to be edited. See Template Callout Details. The **Edit Email Template** window opens. See *Figure 35, Edit Email Template Window.*

Note: General Templates can only be edited in the iQAN Admin role.

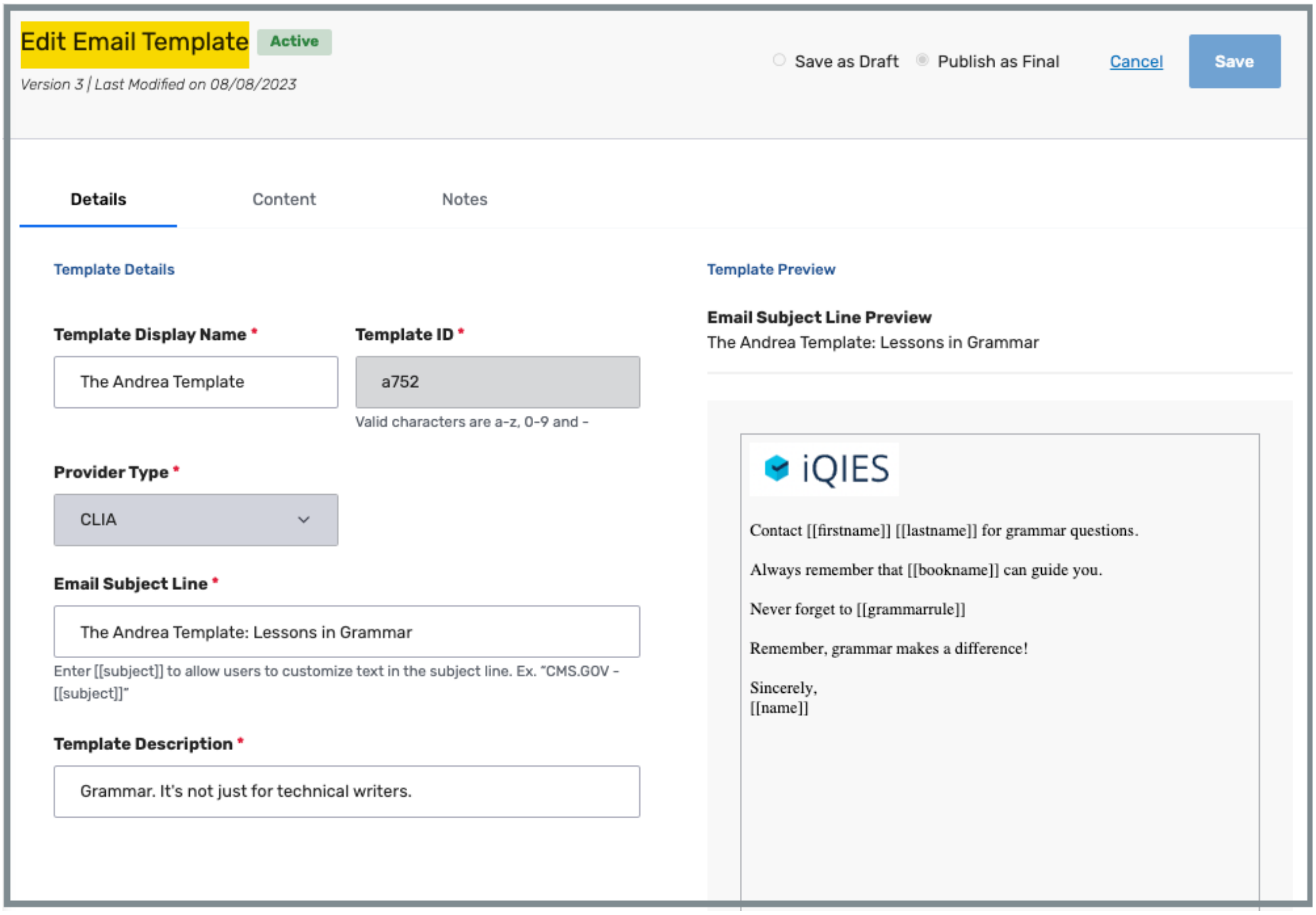

Figure 35: Edit Email Template Window

8.3.2 Edit any desired details.

Notes:

- Fields that are greyed out cannot be changed.
- Update information on any of the three tabs: **Details**, **Content**, or **Notes**.

8.3.3 Click **Save**. The **Recipient Lists** window opens. Verify the **Successfully updated recipient list** green notification banner appears. See *Figure 36, Successfully Updated Template.*

Notes:

- **Save** is greyed out until any changes are made.
- A published template cannot be returned to **Save as Draft**.
- The prior version of the template is automatically moved to **Archive**.

Figure 36: Successfully Updated Template

8.4 Delete or Archive a Template

Notes:

- Only draft templates can be deleted.
- Published templates cannot be deleted. They must be archived. Select **Archive** from the drop-down menu under **Actions** to archive a template.

8.4.1 Select **Delete Draft** under the **Actions** drop-down menu next to the template that needs to be edited. See *Figure 37, Edit Email Template Window.* The **Delete Email Template** window opens. See *Figure 38, Do You Wish To Delete This Draft?*

Note: Templates are user specific and can only be deleted by the user who created them.

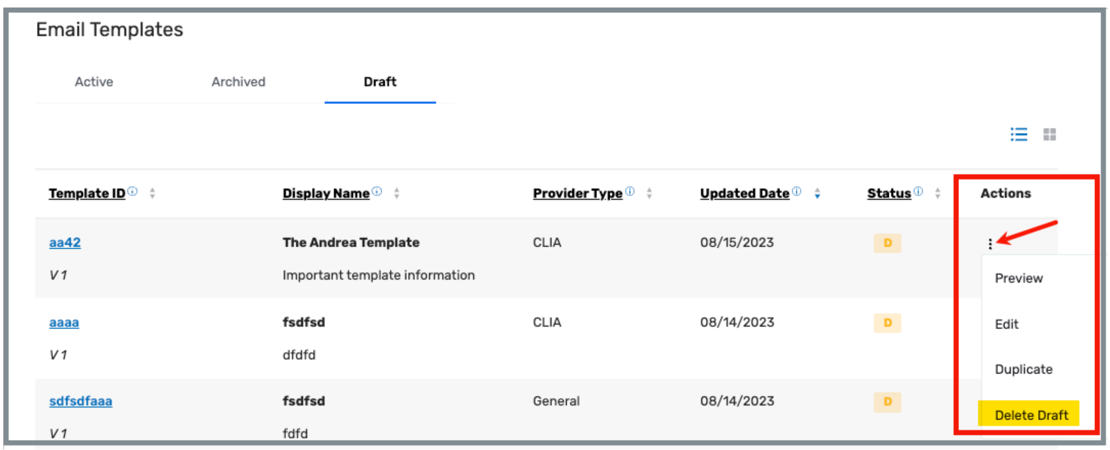

Figure 37: Delete Draft Template Pop-Up Window

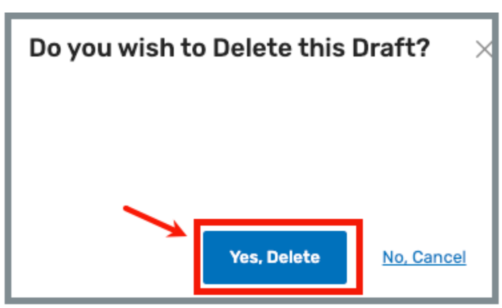

Figure 38: Do You Wish To Delete This Draft?

8.4.2 Click **Yes, Delete**. The **Email Templates** window opens. Verify the **Successfully deleted template** green notification banner appears. See *Figure 39, Successfully Deleted Template Notification.*

Note: Refresh the iQIES page to verify the draft was deleted.

Figure 39: Successfully Deleted Template Notification

8.5 Duplicate a Template

Notes:

- Only draft templates can be deleted.

8.5.1 Select **Duplicate** under the **Actions** drop-down menu next to the template to duplicate. See Template Callout Details. The **Duplicate Email Template** window opens. See *Figure 40, Duplicate Email Template.*

Note: The template is now in draft form and the version has started at V1 again.

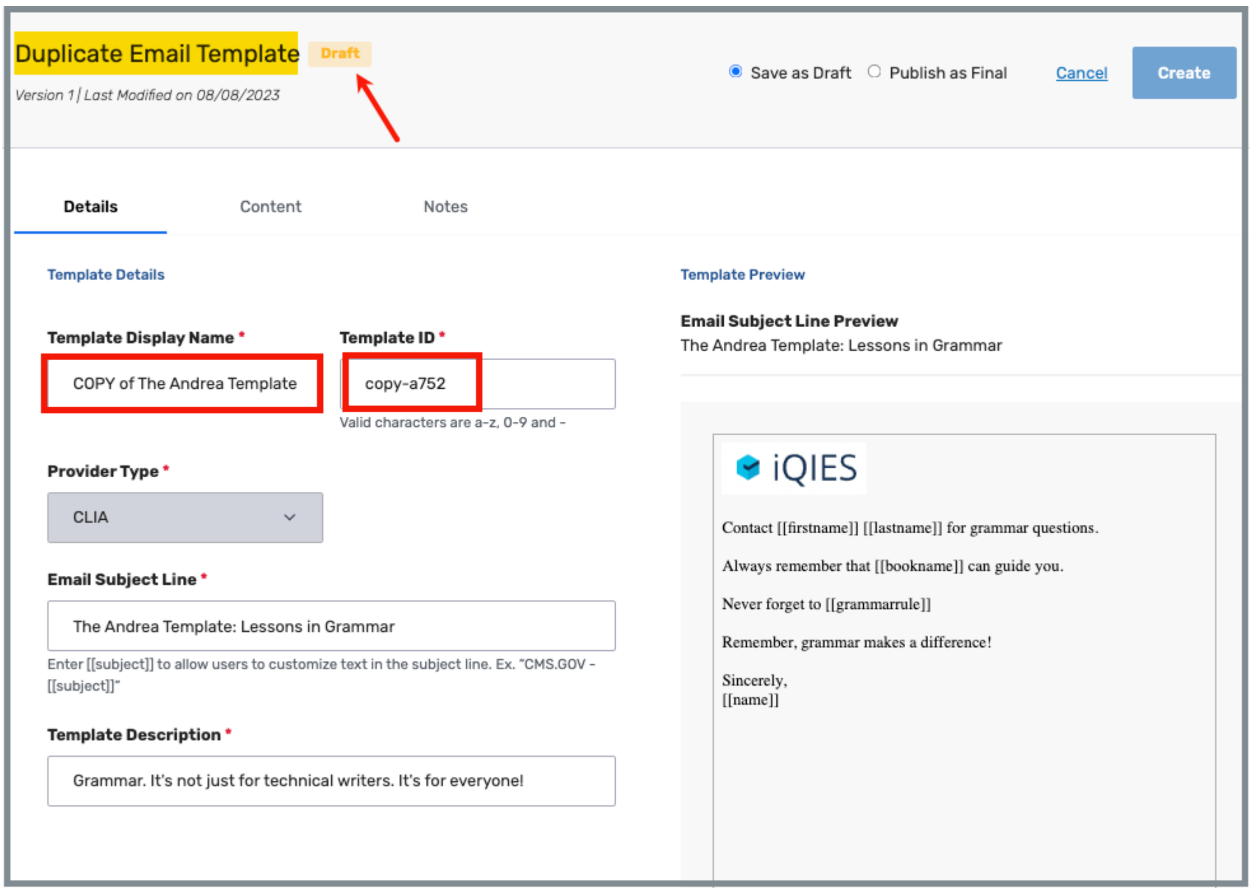

Figure 40: Duplicate Email Template

8.5.2 Update the **Template Display Name** and **Template ID**.

Note: These fields must be updated.

8.5.3 Update any other information desired.

8.5.4 Save as desired.

9. Admin Email Information

Purpose: To view and resend emails.

Notes:

- This function is only available for the **User Admin** and **iQAN Admin** roles.
- Select more than one line using the select boxes at the left to do a bulk resend. Bulk actions buttons then become available.
- Confirmation is required when more than 100 emails are resent.
- The maximum number of emails to resend is 300.

Click **EMAIL INFORMATION** on the left menu. See *Figure 41, Email Information Left Menu*. The **Email Information** window opens. See *Figure 42, Email Information,* and *Table 11, Email Information Callout Details Explanation*.

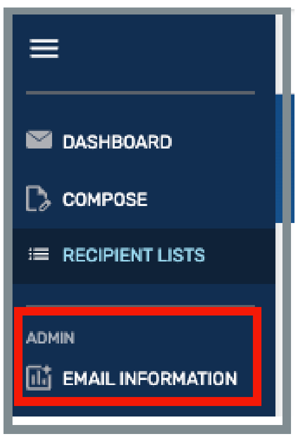

Figure 41: Email Information Left Menu

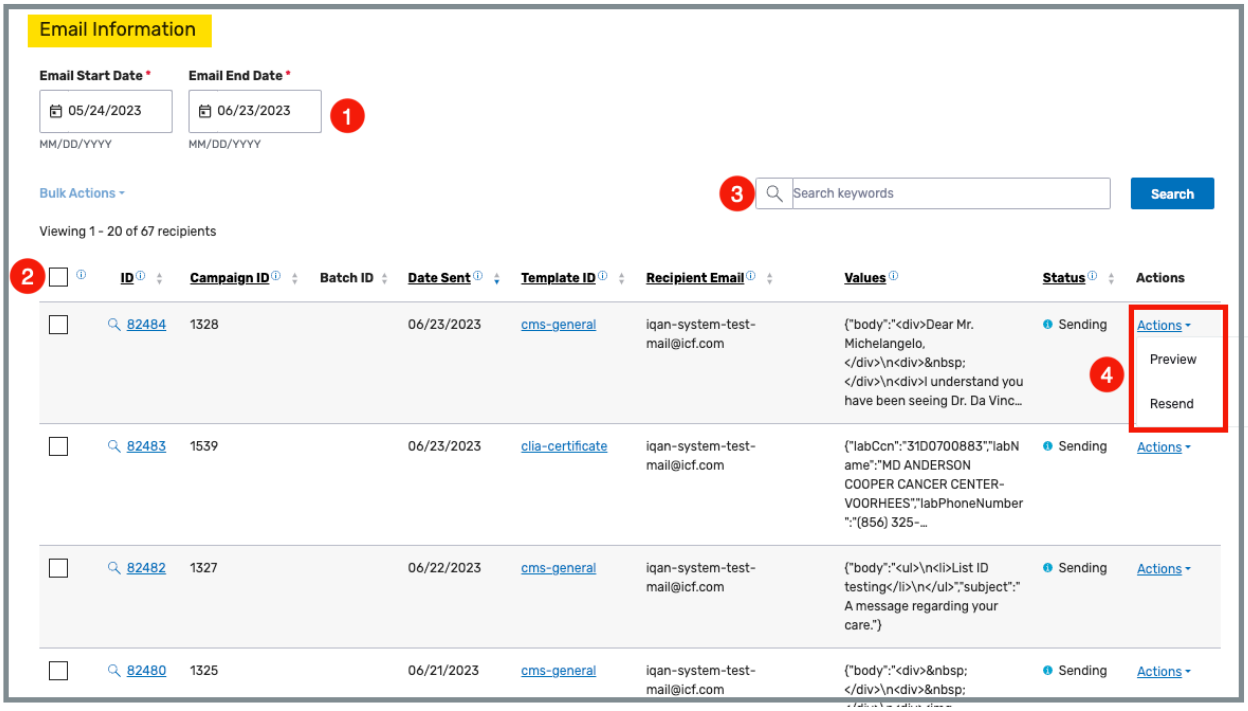

Figure 42: Email Information

Table 11: Email Information Callout Details Explanation

Callout	Detailed Explanation
1	**Email Start/End Date**: Type or select **Start** and **End Dates** to search for emails sent during that specific time period.
2	Select box next to email desired to open email or perform actions. Selection is most helpful when choosing more than one email. When more than one email row is selected and resent, a pop-up window opens and notes that more than one email will be resent. Click **Yes, Send** to continue.
3	Type keyword in the search bar. Click **Search**. Search reviews all emails for the keyword.
4	An email can be viewed or resent. It cannot be deleted.