Centers for Medicare & Medicaid Services

Internet Quality Improvement Evaluation System (iQIES)

iQIES Video Catalog

Job Aid

Version 2.1

February 16, 2023

1. Introduction

This job aid outlines the library of video tutorials currently available for iQIES users. These video tutorials include topics for all four modules in the system:

- Providers
- Surveys
- Intakes
- Enforcements

Video tutorials are also available for the following topics:

- New User Orientation
- Survey & Certification Reports
- Letter Template Management
- QuickSight Dashboards
- Patient Assessment Series

Click any of the above links to learn more about the video tutorials for each topic.

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.

Note: Full access to QSEP, including access to the video tutorials, requires a HARP account. Once a HARP account is created, a user must be assigned a role in QSEP. Refer to the QSEP User Manual for more information, if needed.

2. Access Video Tutorials in QSEP

Notes:

- This process is completed in QSEP.
- QSEP training is intended for learning purposes only and is not official guidance. For official policies and guidance, refer to CMS laws and regulations, including the State Operations Manual (SOM) and CMS official guidance memos. Additional information is listed on the Training Disclaimer page.

2.1 Click the **Username** on the top menu of the **QSEP** home page. A drop-down menu appears.

2.2 Click **My Training** from the drop-down menu to access the **My Training** page. *See Figure 1, My Training Page*.

Figure 1: My Training Page

2.3 Select the provider type icon for your user role to view the table of available training resources.

- This job aid uses the hospice provider type as an example.
- The table displays the **Name**, **Duration**, **CEUs**, **Progress**, **Date Completed**, and **Action** for each available training resource.

2.4 Scroll to the **Post-Basics Training (recommended)** section in the table to locate the iQIES video tutorials. *See Figure 2, Locating iQIES Videos.*

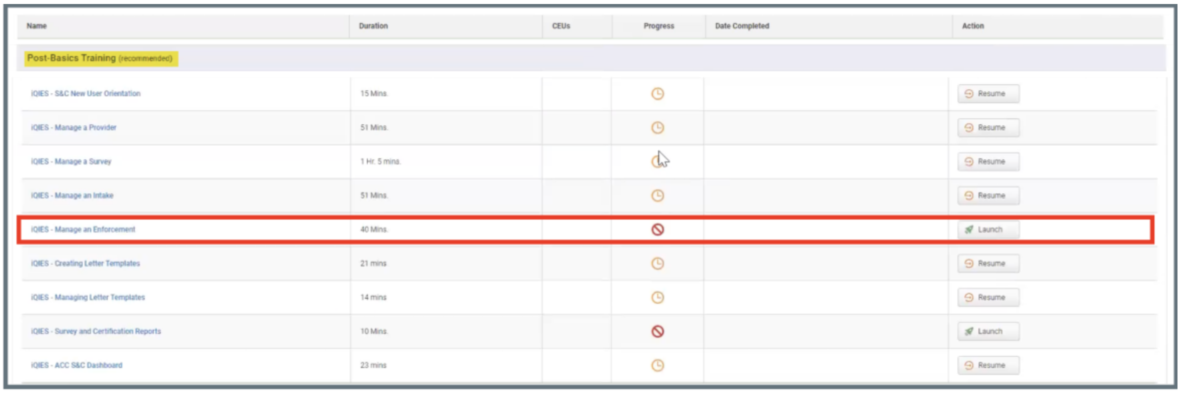

Figure 2: Locating iQIES Videos

2.5 Click **Launch** from the **Action** column that corresponds to the desired video. The **Training Menu** page opens.

Note: If a video is in progress, click **Resume** from the **Action** column. The video may also be started from the beginning.

2.6 The **Training Name** pane on the left shows the title of the video tutorial and a brief description. The **Training Menu** pane on the right shows available video tutorials. Click any link to watch a video. *See Figure 3, Training Menu.*

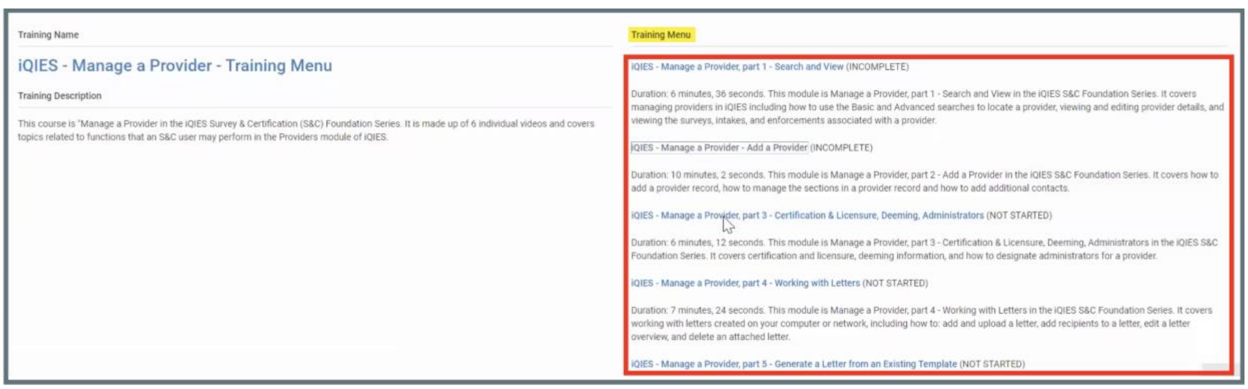

Figure 3: Training Menu

Notes:

- Each video tutorial opens in a new tab.
- The QSEP website logs users out automatically after approximately one hour of inactivity.

3. New User Orientation

The New User Orientation video tutorial demonstrates how to complete the following tasks:

- Log in to iQIES
- Request a user role
- Navigate the system
- Search and Sort
- Tool Tips
- Help

Click the link above to watch the New User Orientation video tutorial or navigate to the video in QSEP.

4. Providers

The **Providers: Manage a Provider** video tutorial series explains how to navigate, add, and attach details to a provider record. Click any of the following links to watch the video tutorial in the series or navigate to the video in QSEP.

4.1 Search and View

The Search and View video tutorial explains the following key concepts:

- Basic and advanced search
- View and edit provider details
- View surveys, intakes, enforcements

4.2 Add a Provider

The Add a Provider video tutorial explains the following key concepts:

- Add a provider
- Manage sections in the provider record
- Inpatient Locations - Hospice Provider Type Only
- Additional Branch Addresses - HHA Provider Type Only
- Add additional contacts

4.3 Certification & Licensure, Deeming, Administrators

The Certification & Licensure, Deeming, Administrators video tutorial explains the following key concepts:

- Certification and licensure
- Deeming information
- Designate administrators

4.4 Buildings and Locations

The Buildings and Locations video tutorial explains the following key concepts:

- Locations - ASC Provider Type Only
- Multiple Locations - Hospice Provider Type Only
- Inpatient Locations - Hospice Provider Type Only

- Edit a Building - ASC and Hospice Provider Types Only
- Delete a Building - ASC and Hospice Provider Types Only

4.5 Working with Letters

The Working with Letters video tutorial explains the following key concepts:

- Add or upload a letter
- Add recipients to a letter
- Edit a letter overview
- Delete an attached letter

4.6 Generate a Letter from an Existing Template

The Generate a Letter from an Existing Template video tutorial explains the following key concepts:

- Difference between standardized/nonstandardized letter templates
- Generate a letter from an existing template
- Edit a letter that uses a nonstandardized template
- Find out more info about letter template management (LTM)

Note: Review the Letter Template Management video series to learn how to create a letter template.

4.7 Notes and Attachments

The Notes and Attachments video tutorial explains the following key concepts:

- Add a note
- Edit and delete a note
- Add an attachment
- Edit attachment details

5. Surveys

The **Surveys: Manage a Survey** video tutorial series explains how to navigate the survey module, including searching for and adding records, assigning team roles, working with forms and letters, and more. Click any of the following links to watch the video tutorial in the series or navigate to the video in QSEP.

5.1 Search, Add, Link

The Search, Add, Link video tutorial explains the following key concepts:

- Search for surveys
- Basic info available on a survey
- Add a survey
- Link a survey from ASC
- Add and remove Responsible Staff

5.2 Survey and QA Teams

The Survey and QA Teams video tutorial explains the following key concepts:

- Add and delete team members
- Assign team coordinator role
- Add QA team members

5.3 Citations and Findings

The Citations and Findings video tutorial explains the following key concepts:

- Add a citation
- Add findings and attachments
- View, edit, delete a citation

5.4 Lock, Merge, Revisit

The Lock, Merge, Revisit video tutorial explains the following key concepts:

- Lock and unlock a citation
- Merge a citation
- Create a revisit survey

5.5 SOD, IDR, POC, Waivers

The SOD, IDR, POC, Waivers video tutorial explains the following key concepts:

- Generate a Statement of Deficiencies
- Create an Informal Dispute Resolution
- Initiate a Plan of Correction
- Waivers

5.6 Forms

The Forms video tutorial explains how to complete the following CMS provider forms:

- CMS-670
- CMS-1572
- CMS-377
- CMS-417
- CMS-643

5.7 Working with Letters

The Working with Letters video tutorial explains the following key concepts:

- Add or upload a letter
- Add recipients to a letter
- Edit a letter overview
- Delete an attached letter

5.8 Generate a Letter from an Existing Template

The Generate a Letter from an Existing Template video tutorial explains the following key concepts:

- Difference between standardized/nonstandardized letter templates
- Generate a letter from an existing template
- Edit a letter that uses a nonstandardized template
- Find out more info about letter template management (LTM)

Note: Review the Letter Template Management video series to learn how to create a letter template.

5.9 Notes, Attachments, and Survey Closed Status

The Notes, Attachments, Survey Closed Status video tutorial explains the following key concepts:

- Add a note
- Edit and delete a note
- Add an attachment
- Edit attachment details

6. Intakes

The **Intakes: Manage an Intake** video tutorial series explains the workflow, searching for and adding an intake, linking a survey, and more. Click any of the following links to watch the video tutorial in the series or navigate to the video in QSEP.

6.1 Introduction to Intakes Workflow

The Introduction to Intakes Workflow video tutorial provides a high-level overview of how an intake moves through its different statuses from initiation to closing.

6.2 Search and Add

The Search and Add video tutorial explains the following key concepts:

- Add and edit an intake
- Add and delete Responsible Staff
- Add Parties Involved

6.3 Allegations, Triage, Findings

The Allegations, Triage, Findings video tutorial explains the following key concepts:

- Add an allegation
- Edit and delete an allegation
- Triage
- Create and add a survey for triage
- Add findings

6.4 Link an Intake to a Survey

The Link an Intake to a Survey video tutorial explains the following key concepts:

- Link an intake to a survey (starting with the survey)
- Link an intake to a survey (starting with the intake)

6.5 Working with Letters

The Working with Letters video tutorial explains the following key concepts:

- Add or upload a letter
- Add recipients to a letter
- Edit a letter overview
- Delete an attached letter

6.6 Generate a Letter from an Existing Template

The Generate a Letter from an Existing Template video tutorial explains the following key concepts:

- Difference between standardized/nonstandardized letter templates
- Generate a letter from an existing template
- Edit a letter that uses a nonstandardized template
- Find out more info about LTM

Note: Review the Letter Template Management video series to learn how to create a letter template.

6.7 Notes, Attachments, Investigation Narrative

The Notes, Attachments, Investigation Narrative video tutorial explains the following key concepts:

- Add a note
- Edit and delete a note
- Add an attachment
- Edit attachment details
- Create and edit an Investigation Narrative

7. Enforcements

The **Enforcements: Manage an Enforcement** video tutorial series explains how to add, view, and edit enforcements, sanctions, civil money penalties, and appeals, as well as how to work with letters and attachments. Click any of the following links to watch the video tutorial in the series or navigate to the video in QSEP.

7.1 Add and View

The Add and View video tutorial explains the following key concepts:

- View recent enforcements
- Add an enforcement
- Add and delete Responsible Staff

7.2 Sanctions

The Sanctions video tutorial explains the following key concepts:

- Add a sanction
- Edit and view a sanction
- Delete a sanction

7.3 Civil Money Penalties

The Civil Money Penalties (CMPs) video tutorial explains how to add, view, and edit CMPs.

7.4 Appeals

The Appeals video tutorial explains the following key concepts:

- Add and edit an appeal
- Add a survey to an appeal
- Add legal action to an appeal
- Edit an injunction

7.5 Working with Letters

The Working with Letters video tutorial explains the following key concepts:

- Add or upload a letter
- Add recipients to a letter
- Edit a letter overview
- Delete an attached letter

7.6 Generate a Letter from an Existing Template

The Generate a Letter from an Existing Template video tutorial explains the following key concepts:

- Difference between standardized/nonstandardized letter templates
- Generate a letter from an existing template
- Edit a letter that uses a nonstandardized template
- Find out more info about LTM

Note: Review the Letter Template Management video series to learn how to create a letter template.

7.7 Notes and Attachments

The Notes and Attachment video tutorial explains the following key concepts:

- Add a note
- Edit and delete a note
- Add an attachment
- Edit attachment details

8. iQIES S&C Reports

The iQIES S&C Reports video tutorial explains the following key concepts:

- Find and run a report
- Save and download a report
- View the My Reports and Reports Activity page

Click the link above to watch the iQIES S&C Reports video tutorial or navigate to the video in QSEP.

9. Letter Template Management

The Letter Template Management video tutorial series explains how to create and manage templates. Click any of the following links to watch the video tutorial in the series or navigate to the video in QSEP.

9.1 Creating Templates

The Creating Templates video tutorial explains the following key concepts:

- Letter template explanation
- Difference between standardized/nonstandardized letter templates
- Create headers and footers for templates
- Create, preview, and publish letter templates

9.2 Managing Templates

The Managing Templates video tutorial explains the following key concepts:

- Search for a template
- Duplicate a template
- Disable and archive a template
- Reinstate an archived template

10. QuickSight Dashboards

The QuickSight video tutorial series explains how to access and leverage dashboards. Click any of the following links to watch the video tutorial in the series or navigate to the video in QSEP.

10.1 ACC S&C Dashboard

The Acute & Continuing Care Survey & Certification Dashboard video tutorial explains the following key concepts:

- Use dashboards to identify trends and inform decisions
- Understand how dashboards evolve
- Engage the dashboard team for feedback and user research

10.2 Enforcement Outcomes Dashboard

The Enforcement Outcomes Dashboard video tutorial explains the following key concepts:

- Access dashboards
- Use dashboards to identify trends and inform decisions
- Understand how dashboards evolve
- Engage the dashboard team for feedback and user research

10.3 Home Health Agency S&C Dashboard

The Home Health Agency Survey and Certification Dashboard video tutorial explains the following key concepts:

- Access dashboards
- Use dashboards to identify trends and inform decisions
- Understand how dashboards evolve
- Engage the dashboard team for feedback and user research

10.4 Nursing Home Citations Dashboard

The Nursing Home Citations Dashboard explains the following key concepts:

- Access dashboards
- Use dashboards to identify trends and inform decisions
- Understand how dashboards evolve
- Engage the dashboard team for feedback and user research

10.5 Survey Analysis Dashboard

The Survey Analysis Dashboard explains the following key concepts:

- Access dashboards
- Use dashboards to identify trends and inform decisions
- Understand how dashboards evolve
- Engage the dashboard team for feedback and user research

11. Patient Assessment

The Patient Assessment video tutorial series explains how to upload, manage, and view assessments as well as run reports. Click any of the following links to watch the video tutorial in the series.

Patient Assessment Video List Page

Direct links to individual videos:

Welcome to iQIES

How to First Log In to iQIES

How to Upload Assessments

How to Run Reports

How to Manage Patient Profiles

How to Manage Assessments

How to Add a New Assessment