



**Centers for Medicare & Medicaid Services**

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

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## **Survey and Certification (S&C) Dashboards User Manual**

**Version 3.0**

**February 1, 2024**

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# 1. Introduction

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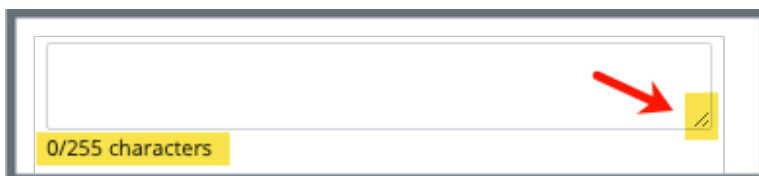
This user manual addresses how to access dashboards in iQIES. The **Acute and Continuing Care Survey and Certification (ACC S&C)**, the **Nursing Home Survey and Certification (NH S&C)**, and the **Top Ten Submission Errors Dashboard** are the only available dashboards at present, but additional dashboards related to Survey and Certification will be released in iQIES over the next few months.

For information on other modules, refer to [Reference & Manuals](#) on QTSO.

## 1.1 Getting Started in S&C – 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 be different from what is shown in screenshots below.
- Screenshots are dependent on user role and may not be an exact representation.
- 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.

- 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: S&C, Patient Assessment, and Reporting.

<b>Assistance Accessing iQIES:</b>	Contact the iQIES Security Official (SO) for your organization
<b>Technical Support:</b>	Contact the iQIES Service Center: <b>Phone:</b> 888-477-7876 (select Option 1) <b>Email:</b> <a href="mailto:iQIES@cms.hhs.gov">iQIES@cms.hhs.gov</a>
<b>CCSQ Support Central:</b>	Create a new ticket or track an existing ticket: <a href="#">CCSQ Support Central</a>
<b>Idea Portal:</b>	Feedback for future iQIES software development: <a href="#">CCSQ Support Central</a> . Click <b>Idea Portals</b> .
<b>More information on iQIES:</b>	Refer to the <a href="#">QIES Technical Support Office</a> (QTSO) and the <a href="#">Quality, Safety, &amp; Education Portal</a> (QSEP). Logging in to HARP may be required before accessing some documentation in QTSO and QSEP.  iQIES reference materials include: <ul style="list-style-type: none"><li>• Links to Training Videos for providers</li><li>• Assessment Management User Manual</li><li>• Quick Reference Guides</li><li>• Onboarding Guide</li><li>• Managing User Information</li><li>• Other helpful iQIES material</li></ul> iQIES training materials on QSEP include S&C Foundation Series Videos

## 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 S&C and require a State Agency S&C General User role or Centers for Medicare & Medicaid Services (CMS) role with the capability to view or edit this information.

Permissions are ultimately governed by HARP access privileges. Contact the 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.

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*

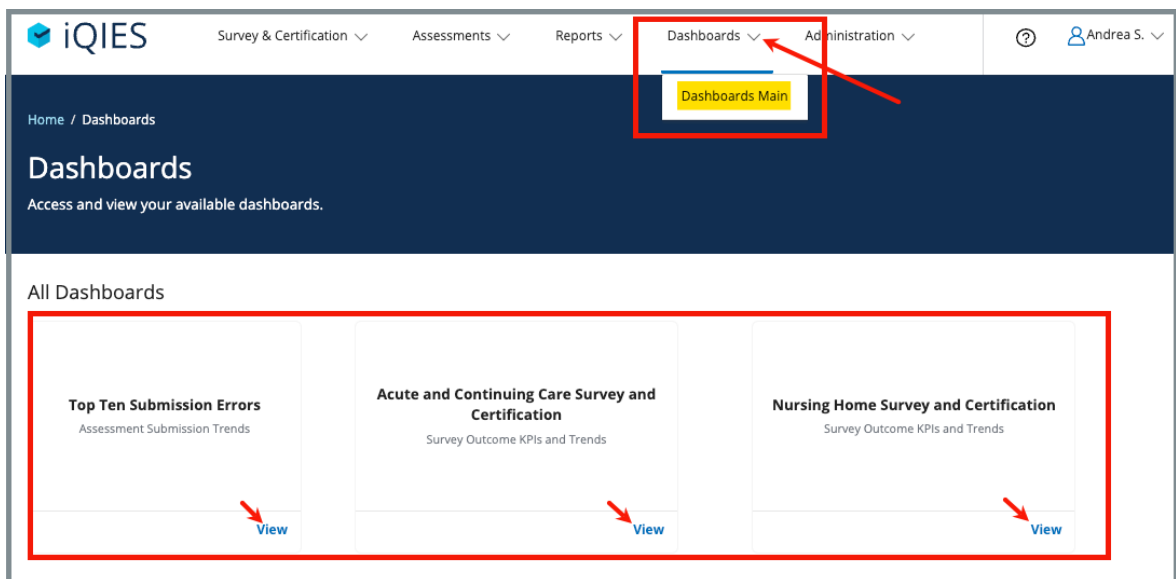


## 2. Access Dashboards

**Purpose:** This section explains how to access dashboards in iQIES.

**Note:** Use a full-screen monitor to open the dashboards. The dashboards must be expanded when opened. They will not work correctly if they are sized small.

- 2.1 Go to **Dashboards** at the top of the iQIES home page. Click the arrow to open the drop-down menu.
- 2.2 Click **Dashboards Main**. The **Dashboards** window opens. *See Figure 3, Dashboards Main Page.* This page lists all dashboards available to your user role.



*Figure 3: Dashboards Main Page*

- 2.3 Click **View** to select any dashboard.

**Note:** Most dashboards contain multiple tabs.

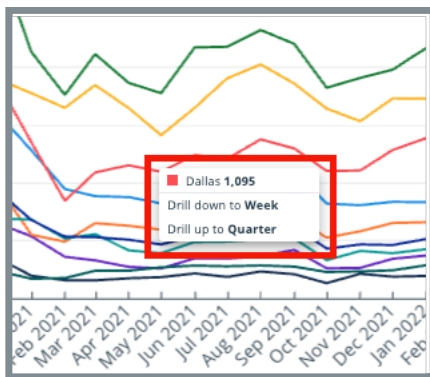
## 3. How to Use Dashboards

3.1 Scroll down to view all sections on each dashboard tab.

**Note: No Data** appears in the graph when there is no data that meets current filtering. Update filters to view data.

3.2 Hover over information to view tips or detailed information.

3.3 Double click on information points in both line and bar graphs to discover further ways to view the information. See *Figure 4, Additional Information*.



**Figure 4: Additional Information**

3.4 Select how to view data. See *Figure 5, View Data*.



**Figure 5: View Data**

- a. Maximize screen
- b. Drill down or drill up
- c. Click vertical ellipsis (menu) to select summary data or to export information to a CSV

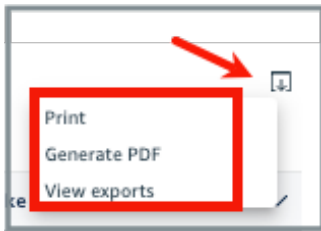
## 4. Download or Print Dashboard Information

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There are two ways to download or print information on the dashboards.

### 4.1 Download or print entire dashboard

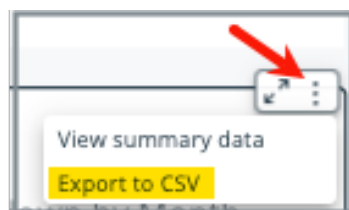
Click the down arrow icon on the top right of the page. See *Figure 6, Download Dashboard*.



*Figure 6: Download Dashboard*

### 4.2 Download or print one section of the dashboard

4.2.1 Hover over the top right corner of any section. The maximize and menu buttons show. Click the vertical ellipsis (menu) to open a menu. See *Figure 7, Export to CSV*.



*Figure 7: Export to CSV*

4.2.2 Select Export to CSV.

## 5. Top Ten Submission Errors Dashboard

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**Purpose:** This dashboard provides an overview of patient assessment submission errors encountered by Home Health Agency (HHA), Inpatient Rehabilitation Facility (IRF), and Long-Term Care Hospital (LTCH) providers.

The Top Ten Submission Errors dashboard has the following tabs:

- Home Health Agencies
- Inpatient Rehabilitation Facilities
- Long-Term Care Hospitals

**Notes:**

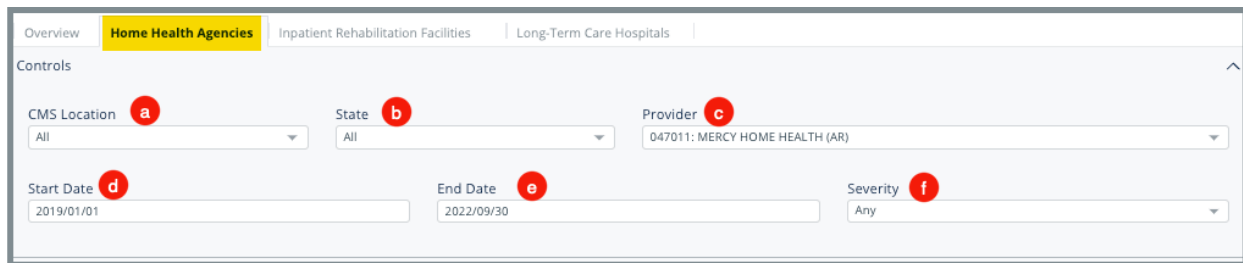
- The **Controls** menu can be accessed from all tabs except **Overview**.
- Each tab has its own **Controls** menu. Details about each **Controls** menu are shown in each section below.
- Any changes made on any tab are valid for each tab. For example, if the **Provider Type** chosen is **Home Health Agency**, each tab then only shows **Home Health Agency** data.

## 5.1 Home Health Agencies

### Controls Tab

**Note:** Data can be filtered by CMS location, state, provider, and many other dimensions related to the S&C process. The data updates in real time.

Click the **Controls** on the top menu to open the **Controls** menu. See *Figure 8, Home Health Agencies Controls Menu*. The **Home Health Agencies Tab Controls** menu opens.



**Figure 8: Home Health Agencies Tab Controls Menu**

**Table 1: Home Health Agencies Callout Detail**

Callout	Control Title	Action
a	<b>CMS Location</b>	Select <b>City</b> or <b>Select all</b>
b	<b>State</b>	Select <b>State</b> or <b>Select all</b>
c	<b>Provider</b>	Type provider name. Click <b>SEARCH</b> . A drop-down menu opens with a list of providers. Select the box next to the correct provider. The name is added under <b>Provider Name</b> . <b>Note:</b> It is not necessary to click <b>Search</b> again.

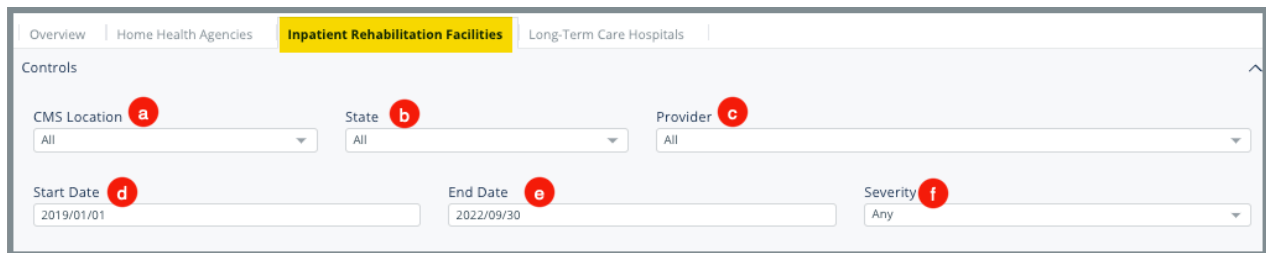
Callout	Control Title	Action
d	<b>Start Date</b>	Type the start date or select from the calendar picker. <b>Note:</b> Date format automatically adjusts to YYYY/MM/DD
e	<b>End Date</b>	Type the end date or select from the calendar picker. <b>Note:</b> Date format automatically adjusts to YYYY/MM/DD
f	<b>Severity</b>	Select <b>Any</b> , <b>Fatal</b> , or <b>Warning</b>

## 5.2 Inpatient Rehabilitation Facilities

### Controls Tab

**Note:** Data can be filtered by CMS location, state, provider, and many other dimensions related to the S&C process. The data updates in real time.

Click the **Controls** on the top menu to open the **Controls** menu. See *Figure 9, Inpatient Rehabilitation Facilities Controls Menu*. The **Inpatient Rehabilitation Facilities Controls** menu opens.



**Figure 9: Inpatient Rehabilitation Facilities Controls Menu**

**Table 2: Inpatient Rehabilitation Facilities Controls Callout Detail**

Callout	Control Title	Action
a	<b>CMS Location</b>	Select <b>City</b> or <b>Select all</b>
b	<b>State</b>	Select <b>State</b> or <b>Select all</b>
c	<b>Provider</b>	Type provider name. Click <b>SEARCH</b> . A drop-down menu opens with a list of providers. Select the box next to the correct provider. The name is added under <b>Provider Name</b> . <b>Note:</b> It is not necessary to click <b>Search</b> again.

Callout	Control Title	Action
d	<b>Start Date</b>	Type the start date or select from the calendar picker. <b>Note:</b> Date format automatically adjusts to YYYY/MM/DD
e	<b>End Date</b>	Type the end date or select from the calendar picker. <b>Note:</b> Date format automatically adjusts to YYYY/MM/DD
f	<b>Severity</b>	Select <b>Any, Fatal, or Warning</b>

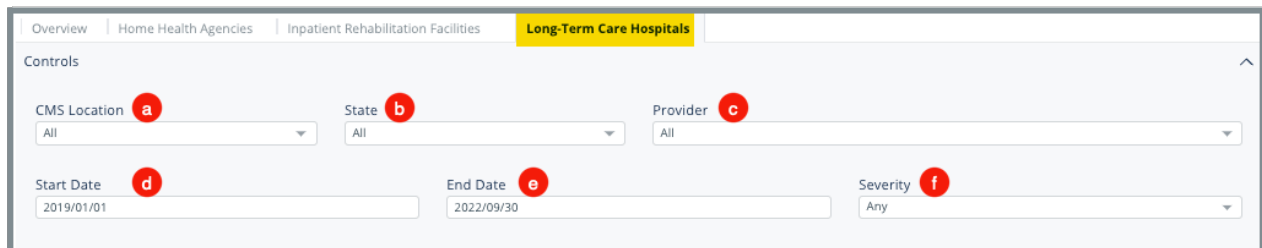


## 5.3 Long-Term Care Hospitals

### Controls Tab

**Note:** Data can be filtered by CMS location, state, provider, and many other dimensions related to the S&C process. The data updates in real time.

Click the **Controls** on the top menu to open the **Controls** menu. See *Figure 10, Long-Term Care Hospitals Controls Menu*. The **Long-Term Care Hospitals Controls** menu opens.



**Figure 10: Long-Term Care Hospitals Controls Menu**

**Table 3: Long-Term Care Hospitals Controls Callout Detail**

Callout	Control Title	Action
a	<b>CMS Location</b>	Select <b>City</b> or <b>Select all</b>
b	<b>State</b>	Select <b>State</b> or <b>Select all</b>
c	<b>Provider</b>	Type provider name. Click <b>SEARCH</b> . A drop-down menu opens with a list of providers. Select the box next to the correct provider. The name is added under <b>Provider Name</b> . <b>Note:</b> It is not necessary to click <b>Search</b> again.

Callout	Control Title	Action
d	<b>Start Date</b>	Type the start date or select from the calendar picker. <b>Note:</b> Date format automatically adjusts to YYYY/MM/DD
e	<b>End Date</b>	Type the end date or select from the calendar picker. <b>Note:</b> Date format automatically adjusts to YYYY/MM/DD
f	<b>Severity</b>	Select <b>Any</b> , <b>Fatal</b> , or <b>Warning</b>

## 6. ACC S&C Dashboard

**Purpose:** This dashboard displays S&C data for all provider types excluding Nursing Homes and CLIA.

The ACC S&C dashboard has the following tabs:

- [Overview](#)
- [Providers](#)
- [Surveys](#)
- [Citations](#)
- [Intakes](#)
- [Provider Last Completed Survey](#)

**Notes:**

- The **Controls** menu can be accessed from all tabs except **Overview**.
- Each tab has its own **Controls** menu. Details about each **Controls** menu are shown in each section below.
- Any changes made on any tab are valid for each tab. For example, if the **Provider Type** chosen is **Home Health Agency**, each tab then only shows **Home Health Agency** data.
- Data is obtained from iQIES for all migrated providers.
- Data is imported from CASPER for non-migrated providers who are not in iQIES database. Each tab shows the CASPER **Data Refresh Date** and **Time** alongside the iQIES **Data Refresh Date** and **Time**. See *Figure 11, CASPER Data Refresh*. A full list of migrated and non-migrated providers are shown on the **Overview** tab.

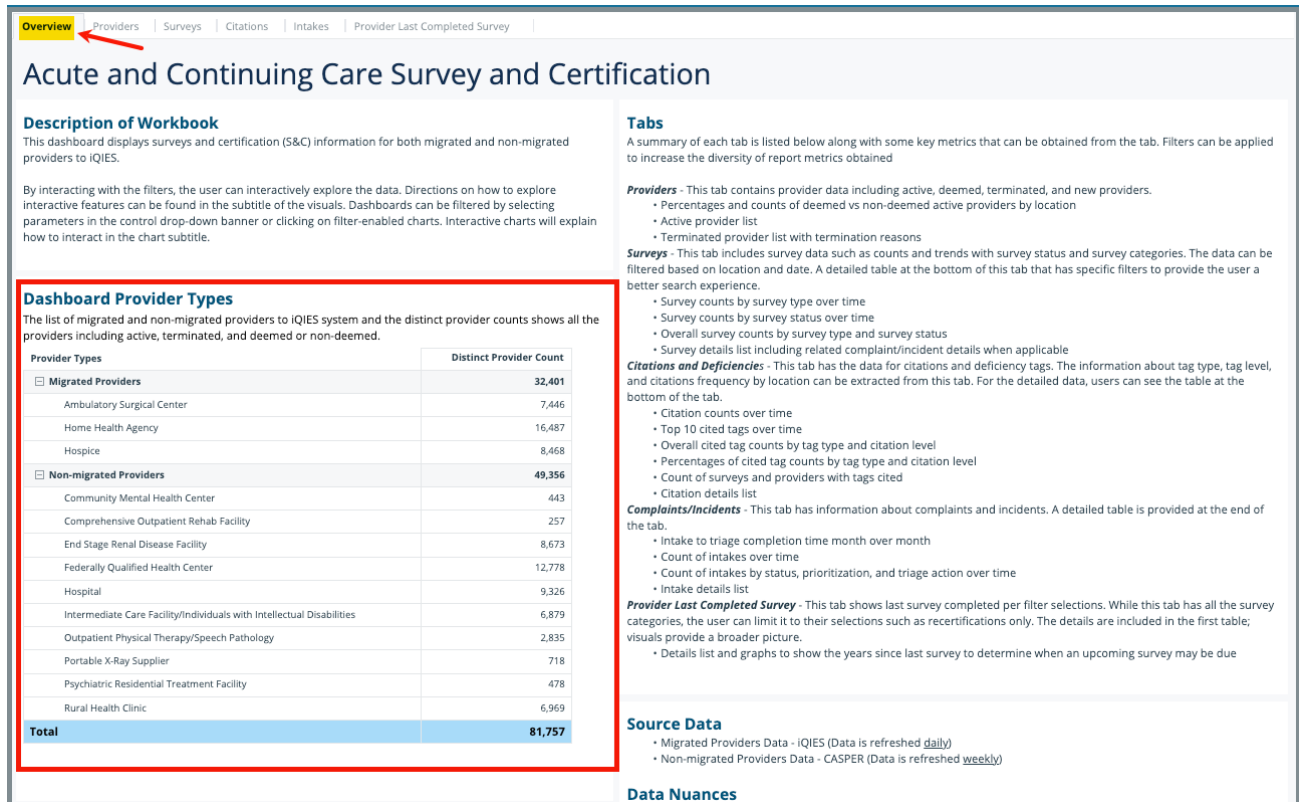
iQIES Data Refresh Date	iQIES Data Refresh Time (EST)	CASPER Data Refresh Date	CASPER Data Refresh Time (EST)
Jan 17, 2024	2:08AM	Jan 14, 2024	1:19PM

*Figure 11: CASPER Data Refresh*

## 6.1 Overview Tab

**Purpose:** Shows an overview of the dashboard.

The ACC S&C dashboard opens on the **Overview** tab. See *Figure 12, ACC S&C Dashboard*.



*Figure 12: ACC S&C Dashboard*

### Dashboard Provider Types

The dashboard reflects data for both migrated and non-migrated providers, excluding Nursing Homes and CLIA.

**Migrated Providers:** Provider records that are in the iQIES system.

**Non-migrated Providers:** Provider records that have not moved to iQIES.

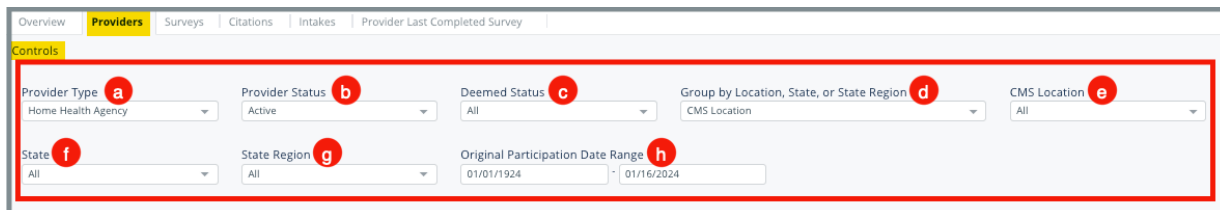
## 6.2 Providers

**Purpose:** Shows the active and terminated provider counts and details.

### Controls Tab

**Note:** Data can be filtered by CMS location, state, provider, and many other dimensions related to the S&C process. The data updates in real time.

Click the **Controls** on the top menu to open the **Controls** menu. See *Figure 13, Provider Tab Controls Menu*. The **Provider Tab Controls** menu opens.



The screenshot displays the 'Provider Tab Controls Menu' within a software interface. The top navigation bar includes 'Overview', 'Providers' (highlighted in yellow), 'Surveys', 'Citations', 'Intakes', and 'Provider Last Completed Survey'. Below this, a 'Controls' tab is active. The main control area is enclosed in a red border and contains the following filters:

- Provider Type (a):** Home Health Agency
- Provider Status (b):** Active
- Deemed Status (c):** All
- Group by Location, State, or State Region (d):** CMS Location
- CMS Location (e):** All
- State (f):** All
- State Region (g):** All
- Original Participation Date Range (h):** 01/01/1924 - 01/16/2024

*Figure 13: Provider Tab Controls Menu*

**Table 4: Provider Tab Callout Detail**

Callout	Control Title	Action
a	<b>Provider Type</b>	Select from the following provider types from the drop-down menu: <ul style="list-style-type: none"> <li>• <b>Ambulatory Surgical Center</b></li> <li>• <b>Community Mental Health Center</b></li> <li>• <b>Comprehensive Outpatient Rehab Facility</b></li> <li>• <b>End State Renal Disease Facility</b></li> <li>• <b>Federally Qualified Health Center</b></li> <li>• <b>Home Health Agency</b></li> <li>• <b>Hospice</b></li> <li>• <b>Hospital</b></li> <li>• <b>Intermediate Care Facility/Individuals with Intellectual Disabilities</b></li> <li>• <b>Outpatient Physical Therapy/Speech Pathology</b></li> </ul>
b	<b>Provider Status</b>	Select <b>Active</b> or <b>Inactive</b>
c	<b>Deemed Status</b>	Select <b>Deemed, Deemed-Under SA Jurisdiction, Non-Deemed, or Select all</b>
d	<b>Group by Location, State or State Region</b>	Select <b>CMS Location, State, or State Region</b>
e	<b>CMS Location</b>	Select <b>City</b> or <b>Select all</b>
f	<b>State</b>	Select <b>State</b> or <b>Select all</b>
g	<b>State Region</b>	Select state, region or <b>Select all</b>
h	<b>Original Participation Date Range</b>	Type range. Use pop-up calendar, if desired.

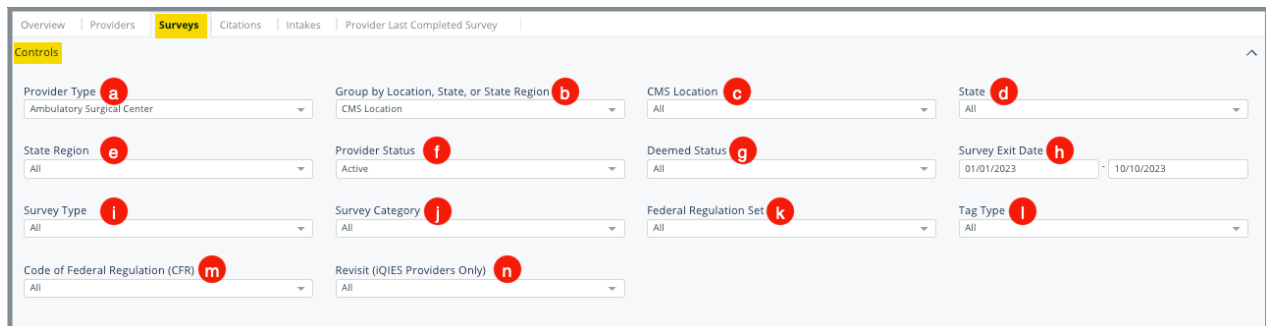
## 6.3 Surveys Tab

**Purpose:** Shows survey activity and citations by survey type.

### Controls Tab

**Note:** Data can be filtered by CMS location, state, provider, and many other dimensions related to the S&C process. The data updates in real time.

Click the **Controls** on the top menu to open the **Controls** menu. See *Figure 14, Surveys Controls Menu*. The **Survey Controls Menu** opens.



The screenshot displays the 'Survey Controls Menu' interface. At the top, there is a navigation bar with tabs: Overview, Providers, Surveys (highlighted), Citations, Intakes, and Provider Last Completed Survey. Below the navigation bar, the 'Controls' section is visible, containing several filter controls:

- Provider Type:** a dropdown menu with 'Ambulatory Surgical Center' selected.
- Group by Location, State, or State Region:** a dropdown menu with 'CMS Location' selected.
- CMS Location:** a dropdown menu with 'All' selected.
- State:** a dropdown menu with 'All' selected.
- State Region:** a dropdown menu with 'All' selected.
- Provider Status:** a dropdown menu with 'Active' selected.
- Deemed Status:** a dropdown menu with 'All' selected.
- Survey Exit Date:** a date range selector with '01/01/2023' and '10/10/2023'.
- Survey Type:** a dropdown menu with 'All' selected.
- Survey Category:** a dropdown menu with 'All' selected.
- Federal Regulation Set:** a dropdown menu with 'All' selected.
- Tag Type:** a dropdown menu with 'All' selected.
- Code of Federal Regulation (CFR):** a dropdown menu with 'All' selected.
- Revisit (iQIES Providers Only):** a dropdown menu with 'All' selected.

**Figure 14: Survey Controls Menu**

*Table 5: Survey Controls Callout Detail*

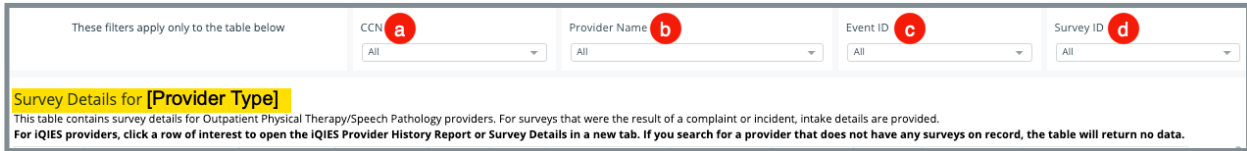
Callout	Control Title	Action
a	Provider Type	Select from the following provider types from the drop-down menu: <ul style="list-style-type: none"> <li>• Ambulatory Surgical Center</li> <li>• Community Mental Health Center</li> <li>• Comprehensive Outpatient Rehab Facility</li> <li>• End State Renal Disease Facility</li> <li>• Federally Qualified Health Center</li> <li>• Home Health Agency</li> <li>• Hospice</li> <li>• Hospital</li> <li>• Intermediate Care Facility/Individuals with Intellectual Disabilities</li> <li>• Outpatient Physical Therapy/Speech Pathology</li> </ul>
b	Group by Location, State or State Region	Select CMS Location or State
c	CMS Location	Select City or Select all
d	State	Select State or Select all
e	State Region	Select state, region or Select all
f	Provider Status	Select Active, Inactive, or Select all
g	Deemed Status	Select Deemed, Deemed-Under SA Jurisdiction, Non-Deemed, or Select all
h	Survey Exit Date	Select the survey exit date range. Use pop-up calendar, if desired.



Callout	Control Title	Action
h	<b>Survey Type</b>	Select <b>Health, Life Safety, or Select all</b>
i	<b>Survey Category</b>	Select from the following survey categories from the drop-down menu: <ul style="list-style-type: none"> <li>• <b>Select all</b></li> <li>• <b>Complaint</b></li> <li>• <b>Initial Certification</b></li> <li>• <b>Initial Licensure</b></li> <li>• <b>Licensure Complaint</b></li> <li>• <b>Re-Licensure</b></li> <li>• <b>Recertification</b></li> <li>• <b>Sample Validation</b></li> <li>• <b>State Licensure</b></li> </ul>
j	<b>Federal Regulation Set</b>	Select from one of the federal regulation sets or <b>Select all</b>
k	<b>Tag Type</b>	Select <b>IJ, Condition, Standard, Element, or Select all</b>
l	<b>Code of Federal Regulation (CFR)</b>	Select the code of federal regulations or <b>Select all</b>
m	<b>Revisit (iQIES Providers Only)</b>	Select <b>N (no), Y (yes) or Select all</b> <b>Note:</b> This filter is for providers in the iQIES system only.

### Survey Details for [Provider Type]

There are survey details for each provider type shown. The details can be filtered by **CCN**, **Provider Name**, **Event ID**, and **Survey ID**. See *Figure 15, Survey Details*.



**Figure 15: Survey Details**

**Table 6: Survey Details Callout Details**

Callout	Control Title	Action
a	<b>CCN</b>	Type <b>CCN</b> and click <b>Search</b> . Check the radio box next the correct provider, or <b>Select all</b> to view results for the specified provider.
b	<b>Provider Name</b>	Type the whole or partial (at least 3 letters) provider name and click <b>Search</b> . Check the radio box next the correct provider, or <b>Select all results</b> to view results for the specified provider.
c	<b>Event ID</b>	Type <b>Event ID</b> and click <b>Search</b> . Check the radio box next the correct event ID, or <b>Select all results</b> to view all results.
d	<b>Survey ID</b>	Type <b>Survey ID</b> and click <b>Search</b> . Check the radio box next the correct survey ID, or <b>Select all results</b> to view all results.

Click the vertical ellipsis to reset or refresh the filters. See *Figure 16, Reset/Refresh Survey Details*.



**Figure 16: Reset/Refresh Survey Details**

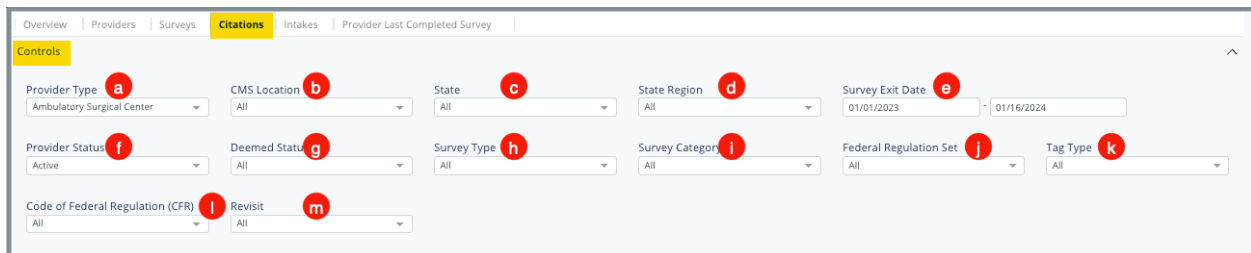
## 6.4 Citations Tab

**Purpose:** Shows provider data related to citations and deficiencies.

### Controls Tab

**Note:** Data can be filtered by CMS location, state, provider, and many other dimensions related to the S&C process. The data updates in real time.

Click the **Controls** on the top menu to open the **Controls** menu. See *Figure 17, Citations Controls Menu*. The **Citations Controls Menu** opens.



**Figure 17: Citations Controls Menu**

**Table 7: Citations Controls Callout Detail**

Callout	Control Title	Action
a	Provider Type	<p>Select from the following provider types from the drop-down menu:</p> <ul style="list-style-type: none"> <li>• Ambulatory Surgical Center</li> <li>• Community Mental Health Center</li> <li>• Comprehensive Outpatient Rehab Facility</li> <li>• End State Renal Disease Facility</li> <li>• Federally Qualified Health Center</li> <li>• Home Health Agency</li> <li>• Hospice</li> <li>• Hospital</li> <li>• Intermediate Care Facility/Individuals with Intellectual Disabilities</li> <li>• Outpatient Physical Therapy/Speech Pathology</li> </ul>

Callout	Control Title	Action
b	<b>CMS Location</b>	Select city or <b>Select all</b>
c	<b>State</b>	Select state or <b>Select all</b>
d	<b>State Region</b>	Select state, region or <b>Select all</b>
e	<b>Survey Exit Date</b>	Select the survey exit date range. Use pop-up calendar, if desired.
f	<b>Provider Status</b>	Select <b>Active, Inactive</b> or <b>Select all</b>
g	<b>Deemed Status</b>	Select <b>Deemed, Deemed-Under SA Jurisdiction, Non-Deemed,</b> or <b>Select all</b>
h	<b>Survey Type</b>	Select <b>Health, Life Safety,</b> or <b>Select all</b>
i	<b>Survey Category</b>	Select from the following survey categories from the drop-down menu: <ul style="list-style-type: none"> <li>• <b>Select all</b></li> <li>• <b>Complaint</b></li> <li>• <b>Initial Certification</b></li> <li>• <b>Initial Licensure</b></li> <li>• <b>Licensure Complaint</b></li> <li>• <b>Re-Licensure</b></li> <li>• <b>Recertification</b></li> <li>• <b>Sample Validation</b></li> <li>• <b>State Licensure</b></li> </ul>
j	<b>Federal Regulation Set</b>	Select from one of the federal regulation sets or <b>Select all</b>
k	<b>Tag Type</b>	Select <b>IJ, Condition, Standard,</b> or <b>Select all</b>
l	<b>Code of Federal Regulation (CFR)</b>	Select the code of federal regulations or <b>Select all</b>
m	<b>Revisit</b>	Select <b>N (no), Y (yes)</b> or <b>Select all</b>

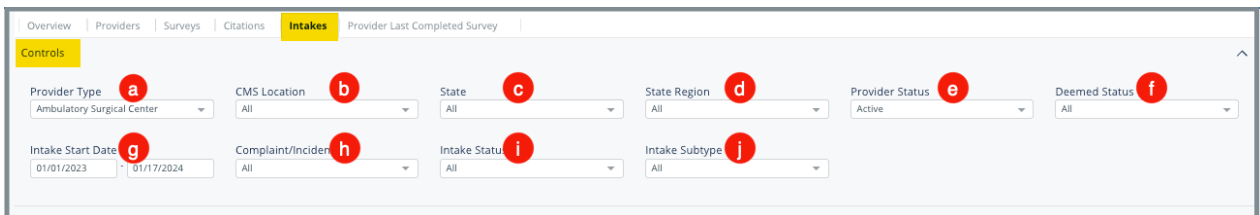
## 6.5 Intakes Tab

**Purpose:** Shows complaint and incident data for surveys.

### Controls Tab

**Note:** Data can be filtered by CMS location, state, provider, and many other dimensions related to the S&C process. The data updates in real time.

Click the **Controls** on the top menu to open the **Controls** menu. See *Figure 18, Intakes Controls Menu*. The **Intakes Controls Menu** opens.



**Figure 18: Intakes Controls Menu**

**Table 8: Intakes Controls Callout Detail**

Callout	Control Title	Action
a	Provider Type	<p>Select from the following provider types from the drop-down menu:</p> <ul style="list-style-type: none"> <li>• Ambulatory Surgical Center</li> <li>• Community Mental Health Center</li> <li>• Comprehensive Outpatient Rehab Facility</li> <li>• End State Renal Disease Facility</li> <li>• Federally Qualified Health Center</li> <li>• Home Health Agency</li> <li>• Hospice</li> <li>• Hospital</li> <li>• Intermediate Care Facility/Individuals with Intellectual Disabilities</li> <li>• Outpatient Physical Therapy/Speech Pathology</li> </ul>

Callout	Control Title	Action
b	<b>CMS Location</b>	Select city or <b>Select all</b>
c	<b>State</b>	Select state or <b>Select all</b>
d	<b>State Region</b>	Select state, region or <b>Select all</b>
e	<b>Provider Status</b>	Select <b>Active, Inactive</b> or <b>Select all</b>
f	<b>Deemed Status</b>	Select <b>Deemed, Deemed-Under SA Jurisdiction, Non-Deemed,</b> or <b>Select all</b>
g	<b>Intake Start Date</b>	Select the intake start date range. Use pop-up calendar, if desired.
h	<b>Complaint/Incident</b>	Select <b>NULL, Complaint, Entity Reported Incident, Incident</b> or <b>Select all.</b>
i	<b>Intake Status</b>	Select intake status from the drop-down menu or <b>Select all.</b>
j	<b>Intake Subtype</b>	Select intake subtype from the drop-down menu or <b>Select all.</b>

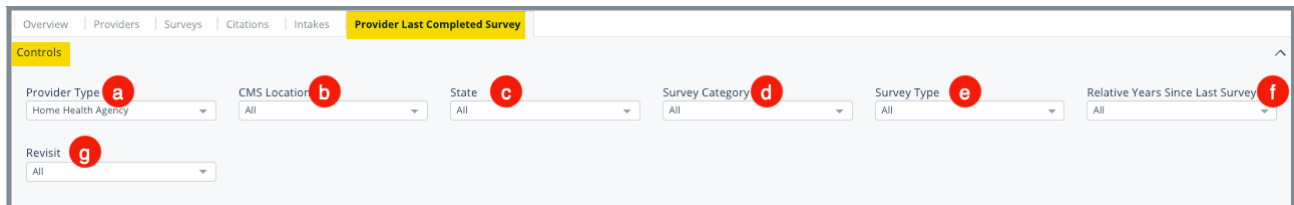
## 6.6 Provider Last Completed Survey Tab

**Purpose:** Shows data for nondeemed, active providers and their last completed survey date.

### Controls Tab

**Note:** Data can be filtered by CMS location, state, provider, and many other dimensions related to the S&C process. The data updates in real time.

Click the **Controls** on the top menu to open the **Controls** menu. See *Figure 19, Provider Last Completed Survey Controls Menu*. The **Provider Last Completed Survey Controls Menu** opens.



The screenshot displays the 'Provider Last Completed Survey' tab with a 'Controls' sub-tab selected. The controls menu includes several dropdown filters: 'Provider Type' (set to 'Home Health Agency'), 'CMS Location' (set to 'All'), 'State' (set to 'All'), 'Survey Category' (set to 'All'), 'Survey Type' (set to 'All'), 'Relative Years Since Last Survey' (set to 'All'), and 'Revisit' (set to 'All'). Each filter is marked with a red lettered circle (a through g).

**Figure 19: Provider Last Completed Survey Controls Menu**

**Table 9: Provider Last Completed Survey Tab Callout Detail**

Callout	Control Title	Action
a	Provider Type	Select from the following provider types from the drop-down menu: <ul style="list-style-type: none"> <li>• Ambulatory Surgical Center</li> <li>• Community Mental Health Center</li> <li>• Comprehensive Outpatient Rehab Facility</li> <li>• End State Renal Disease Facility</li> <li>• Federally Qualified Health Center</li> <li>• Home Health Agency</li> <li>• Hospice</li> <li>• Hospital</li> <li>• Intermediate Care Facility/Individuals with Intellectual Disabilities</li> <li>• Outpatient Physical Therapy/Speech Pathology</li> </ul>
b	CMS Location	Select City or Select all
c	State	Select State or Select all
d	Survey Category	Select from the following survey categories from the drop-down menu: <ul style="list-style-type: none"> <li>• Select all</li> <li>• Complaint</li> <li>• Initial Certification</li> <li>• Initial Licensure</li> <li>• Licensure Complaint</li> <li>• Re-Licensure</li> <li>• Recertification</li> <li>• Sample Validation</li> </ul>



Callout	Control Title	Action
		<b>State Licensure</b>
e	<b>Survey Type</b>	Select <b>Health</b> or <b>Select all</b>
f	<b>Relative Years Since Last Survey</b>	Select years, <b>No Surveys on Record</b> , or <b>Select all</b>
g	<b>Revisit</b>	Select <b>N (no)</b> , <b>Y (yes)</b> or <b>Select all</b>

## 7. NH S&C Dashboard

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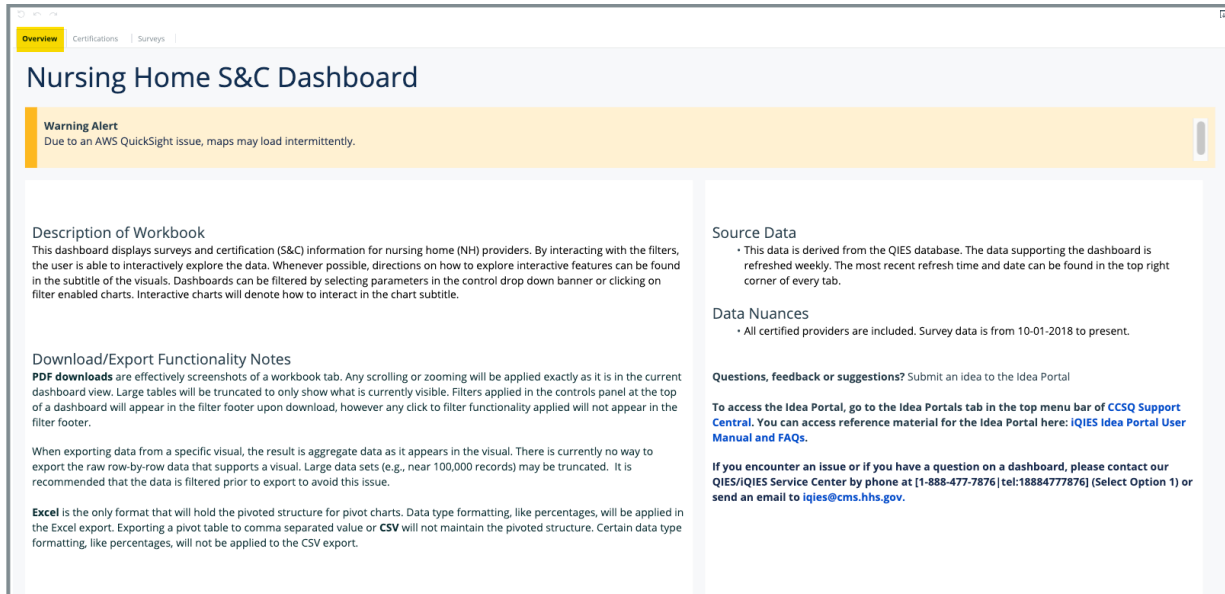
**Purpose:** This dashboard displays S&C information for NH providers.

**Notes:**

- There are three NH tabs: **Overview**, **Certifications**, **Surveys**.
- The **Controls** menu can be accessed from all tabs except **Overview**.
- Each tab has its own **Controls** menu. Details about each **Controls** menu are shown in each section below.

## 7.1 Overview Tab

The NH S&C dashboard opens on the **Overview** tab. See *Figure 20, Acute and Continuing Care Survey and Certification Dashboard*.



**Figure 20: NH S&C Dashboard**

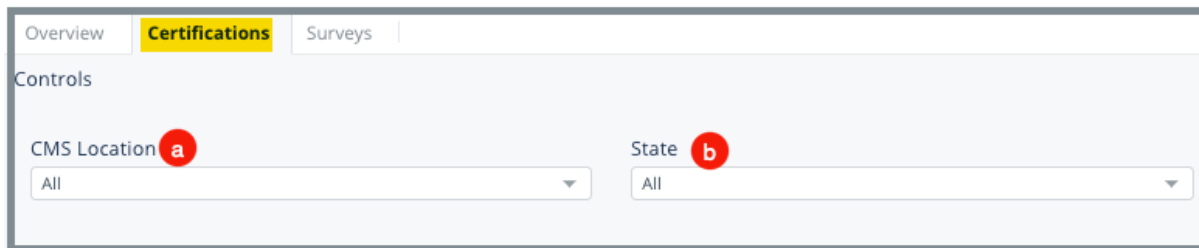
## 7.2 Certifications Tab

**Purpose:** Shows Nursing Homes certification and recertification history.

### Controls Tab

**Note:** Data can be filtered by CMS location or state. The data updates in real time.

Click the **Controls** on the top menu to open the **Controls** menu. See *Figure 21, NH Certifications Tab Controls Menu*. The **Nursing Home Certifications Tab Controls** menu opens.



*Figure 21: NH Certifications Tab Controls Menu*

*Table 10: NH Certifications Tab Callout Detail*

Callout	Control Title	Action
a	<b>CMS Location</b>	Select <b>City</b> or <b>Select all</b>
b	<b>State</b>	Select <b>State</b> or <b>Select all</b>

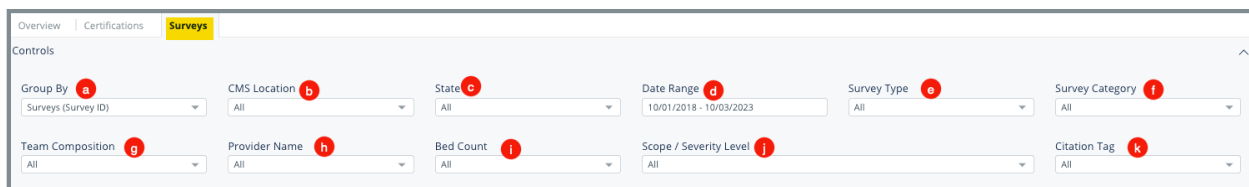
## 7.3 Surveys Tab

**Purpose:** Shows information about completed surveys and citation trends.

### Controls Tab

**Note:** Data can be filtered by CMS location, state, provider, and many other dimensions related to the S&C process. The data updates in real time.

Click the **Controls** on the top menu to open the **Controls** menu. See *Figure 22, NH Surveys Controls Menu*. The **Nursing Home Survey Controls Menu** opens.



*Figure 22: NH Survey Controls Menu*

*Table 11: NH Survey Controls Callout Detail*

Callout	Control Title	Action
a	<b>Group By</b>	Select from the <b>Citations (Tag ID)</b> , <b>Providers (Surveyed)</b> , or <b>Surveys (Survey ID)</b> from the drop-down menu
b	<b>CMS Location</b>	Select <b>City</b> or <b>Select all</b>
c	<b>State</b>	Select <b>State</b> or <b>Select all</b>
d	<b>Date Range</b>	Select date range
e	<b>Survey Type</b>	Select the <b>Survey Type</b> (e.g., <b>COMPLAINT SURVEY</b> , <b>FMS SURVEY</b> )
f	<b>Survey Category</b>	Select <b>HEALTH SURVEY</b> , <b>LIFE SAFETY SURVEY</b> , or <b>Select all</b>

Callout	Control Title	Action
g	<b>Team Composition</b>	Select team composition, or <b>Select all</b>
h	<b>Provider Name</b>	Type provider name. Click <b>SEARCH</b> . A drop-down menu opens with a list of providers. Select the box next to the correct provider. The name is added under <b>Provider Name</b> . It is not necessary to click <b>Search</b> again.
i	<b>Bed Count</b>	Select the number of beds
j	<b>Scope/Severity Level</b>	Select the scope or severity level or <b>Select all</b>
K	<b>Citation Tag</b>	Select tag or or <b>Select all</b>