Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Survey and Certification (S&C)
Letter Template Management
User Manual

Version 1.2

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Table of Contents

List of Figures

List of Tables

1.   Introduction

This S&C User Manual addresses Letter Template Management and shows how to create, edit, and use letter templates.

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*.
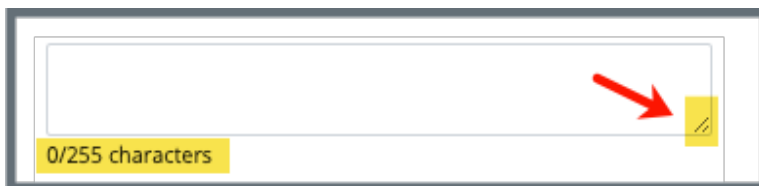

Figure 1: Expandable Field

- 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.

- 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.
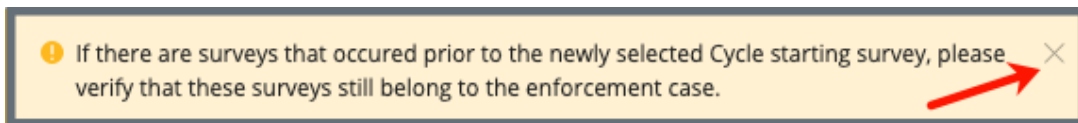
Figure 2: Notification Banner

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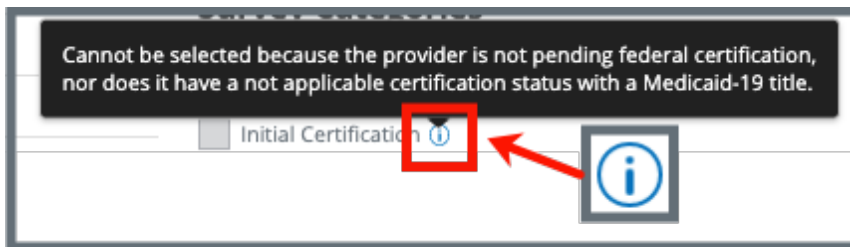
Figure 3: Tool Tip Icon

- 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 within the various iQIES components: S&C, Patient Assessment, and Reporting.

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

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.

iQIES reference materials include:

- Other volumes of the S&C User Manual
- Links to Training Videos for providers
- Assessment Management User Manual
- Quick Reference Guides
- Onboarding Guide
- Managing User Information
- Other helpful iQIES material

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 and a Letters Administrator role or for CMS staff, a Centers for Medicare & Medicaid Services (CMS) role.

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 4, Help Icon*, for further information.

Figure 4: Help Icon

2.   Letter Template Management Overview

A letter template provides standardized format and content for correspondence to customers. There are two types of templates: Standardized and Nonstandardized. These are explained in detail in step 5, Create a New Template.

Notes:

- Letters are attached to the record in the specific provider, survey, intake, or enforcement.

- Templates cannot be shared across types (provider, survey, intake, enforcement).

- Batch letters are not currently supported.

- Refer to the Manage a Survey, Manage a Provider, Manage an Intake, or Manage an Enforcement user manuals for specific details, if needed.

3.   Letter Template Management Location

3.1.   Go to **Administration** on the top menu.

3.2.   Click the arrow and select **Letter Template Management** from the drop-down menu. *See Figure 5, Letter Template Management Drop-Down.* The **Template Library** page opens.
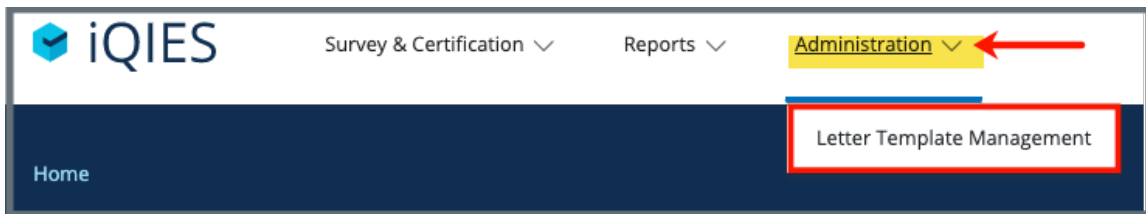
Figure 5: Letter Template Management Drop-Down

4.   Search for a Letter Template

Purpose: To search for drafts and published templates. An advanced search is available to search for a template based on chosen criteria.

Notes:

- There are four template types: **Provider**, **Survey**, **Intake**, **Enforcement**.

- Templates are associated with either a provider, survey, intake, or enforcement as they are dependent on the data in those records.

- The examples shown below are for the provider Templates. All four **Template Libraries** are set up the same way. Be sure to look on the tab that corresponds to the template needed.

4.1   Type template name or any keyword into search box. See *Figure 6, Search for a Template*.

4.2   Click **Search**. A list of templates appears below.

Figure 6: Search for a Template

Notes:

- Template names and descriptions can be sorted in aphabetical or reverse alphabetical order. Click the arrows next to the heading to sort. The headings are:

  o **ID**
  o **Name**
  o **Status** (Draft, Published, Archived)
  o **Template Type**
  o **Provider Type**
  o **Marginal Type** (content, header, footer)
  o **Last Used Date**
  o **Actions** (Duplicate, Archive)

- Click **Show Advanced Search** for a more detailed search. Refer to steps 4.3 and 4.4 below.

4.3   Click **Show Advanced Search**, if desired, to open the **Advanced Search** drop-down menu and narrow the search criteria. See *Figure 7*, *Advanced Search*.

4.4   Type in desired detailed criteria. Click **Search**. The templates show below.

        Note: Click **Hide Advanced Search** to close the **Advanced Search** menu.

Figure 7: Advanced Search

5.   Create a New Template

Purpose: To create a template that can be used in both standardized and nonstandardized letters. A template can be a letter or a header or footer.

Nonstandardized State Letter Templates:

- Reside in iQIES for a specific state
- Can be accessed and changed by any State Agency General User (SAGU) for the specific state

Nonstandardized Federal Letter Templates:

- Can be accessed for a particular state
- Can be changed by any CMS General User (CMSGU).

Standardized templates:

Can be accessed by any user for that state in Letter Template Management but can only be edited by the original author. See step 9, Attach a Template to a Record for more information.

5.1   Click **Create New Template** on top right of window. The **Create a new template** pop-up window opens. See *Figure 8, Create a New Template.*

Figure 8: Create a New Template

5.2   Fill in the fields. See *Table 1, New Template Field Descriptions* for details of the fields.

Table 1: New Template Field Descriptions

Template Field	Description
ID	A unique ID that is selected for templates. The system gives the template a random 4-digit/letter ID, but that ID can be changed, if desired.
Template Name	Type the name of the template
Standardized Template	Click the box next to **Standardized Template** to create a template that cannot be changed when generating a letter. Textholders may be updated, but other content cannot be changed. The template can be edited in the **Letter Template Management** section.
Description	Type a brief description of the template so it can be easily found during a search
Marginal Type	Select the type of template. Selections vary depending on choice.
Content	This template is a letter. The following fields appear when **Content** is selected: **Template Type**, **Header**, **Footer**
Header/Footer	This template is either just a header or just a footer. It can be added to content templates to create other templates. Both the header and footer are created at the top of the page. They will appear correctly when added to a letter template.

Template Field	Description
Template Type	Select from **Provider**, **Survey**, **Intake**, or **Enforcement. Template Type** cannot be edited after the template is saved.
Header/Footer	Select from the drop-down menu
Provider Type	**All** is the default selection. Delete **All** to view the drop-down menu of individual selections. **Provider Type** cannot be edited after the template is saved.
State	Select from the drop-down menu. The state cannot be edited after the template is saved. Duplicate the letter to create a letter for more than one state.

5.3   Click **Save**. The newly-created letter template opens. See *Figure 9, Letter Template Parts Explanation*.
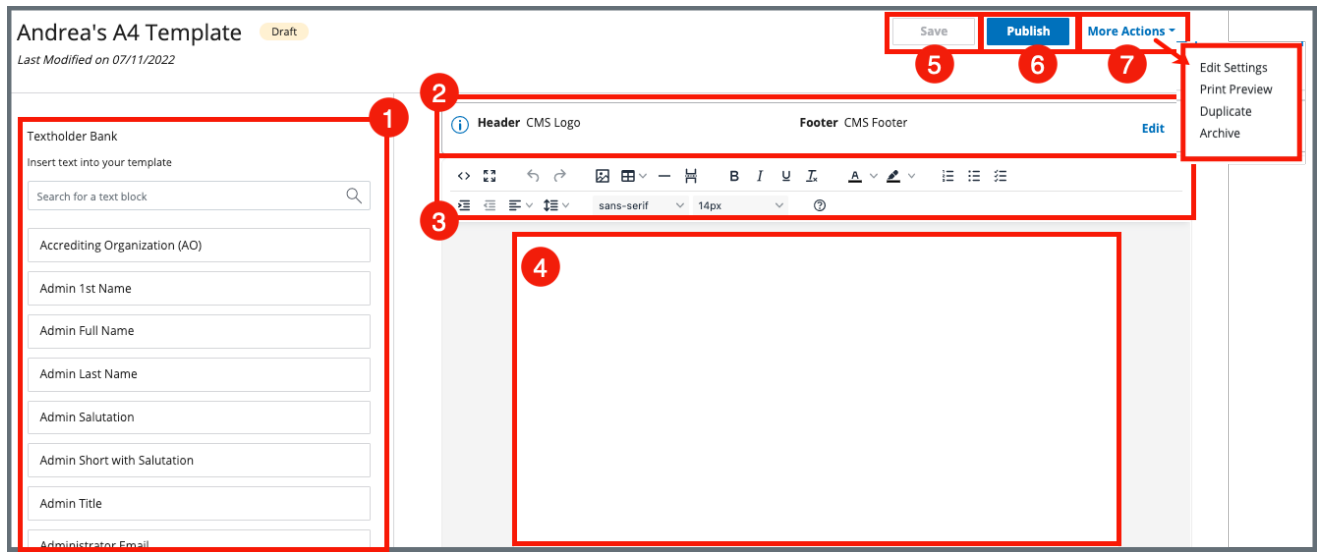
Figure 9: Letter Template Parts Explanation

1. **Textholder Bank**: This is a list of all the textholders that can be added to the letter template. Each textholder represents data specific to the provider, survey, intake, or enforcement area. The list is specific to each area and is in alphabetical order. Type the first few letters of desired text in the **Search** box to search for a specific textholder. Textholders for each area are located in [Appendices B-E.](#)

2. **Header/Footer/Edit**: Headers and footers are noted here if they are used. Click **Edit** to edit the template header, footer, ID, name, or description. The **Edit Settings** window opens and can be edited.

3. **Editor**: Allows content to be edited, including formatting, bulleting, etc.

4. **Letter Template**: This is the letter template to be created. Add textholders for data.

5. **Save**: Save as a draft.

6. **Publish**: Publish to add to template library for use.

7. **More Actions**:

   - **Edit Settings** updates template settings
   - **Print Preview** shows print preview
   - **Duplicate** copies the template

- **Archive** removes template from circulation. The template cannot be used, but it can be reinstated. See step 8, <u>Archive a Template</u>, for further information.

- **Return as Draft** is used when an active or archived template needs to be edited. The template can be republished when needed. It is not available for use until it is republished.

5.4   Click the image icon at the top of the template to add a logo, if desired. The **Insert/Edit Image** window pops up. Click **Upload**. Drag and drop a logo/picture into the **Drop an image here** box or click **Browse for an image** to upload an image from the computer. Click **Save**. See *Figure 10, Upload Image*.
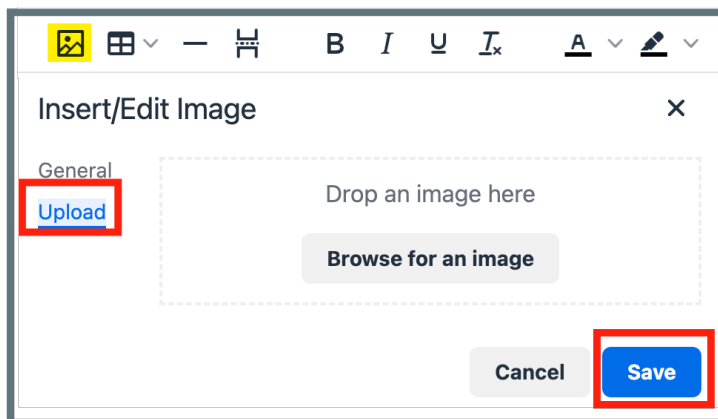
Figure 10: Upload Image

Notes:

- The **General** tab automatically displays the **Source** location of the image. Do not edit the location as this interferes with the upload process.

- A logo can be copied and pasted into the letter template.

5.5   Create the template in the text box. Put cursor in desired area to add information. Type the template information or copy and paste from an existing document.

Note: Create the template as it is done in any word processing program. Type words, copy text from existing documents and paste in the text box, format the text, etc. See <u>Appendix A, Tips and Tricks for Creating a Template</u>.

5.6   Select from **Textholder Bank** for record data to be inserted. Click any
        textholder to insert it in the document.

        Notes:

        • Textholder data is automatically inserted in the template when the
          letter is generated for use. See Appendices B-E for a list of textholders
          for each specific provider, survey, intake, or enforcement area.

        • Custom textholders can be created with the **Custom Text Prompt** from
          the Textholder Bank. For more information on Custom Text Prompts,
          see step 10.

5.7   Click **Save** to save as a draft.

5.8   Click **Publish** to publish template.

        Note: **Publish** makes the template available for any users in the **Letters**
                section specific to each of the provider, survey, intake, or
                enforcement area, i.e., a letter can now be created with the
                template. See step 9, Attach a Template to a Record for more
                information on how to create a letter with a template, if necessary.

6.   Edit a Template

Purpose: To edit an existing template.

Notes:

- To make updates in a nonstandardized template, refer to step 9, Attach a Template to a Record.

- **Marginal Type, Template Type**, and **Provider Type** cannot be edited after the template is saved.

6.1   Click the desired template under **Name** from the Template Library. The template opens.

6.2   Click **Edit** to edit template ID, name, description, header, or footer. See *Figure 11, Edit a Template*. The **Edit Settings** window pops up.
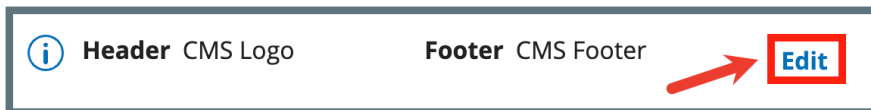
Figure 11: Edit a Template

Note: Select **Edit Settings** from the **More Actions** drop-down menu to open the **Edit Settings** window.

6.3   Update the template as desired.

6.4   Click **Save** to save as a draft.

6.5   Click **Publish** to publish template.

7.   Duplicate a Template

Purpose: To duplicate an existing template for use in another area.

Notes:

- **Marginal Type, Template Type,** and **Provider Type** cannot be edited after the template is saved.

- Standardized templates can be duplicated.

7.1   Select **Duplicate** from the **More Actions** drop-down menu. See *Figure 12, Duplicate a Template*. The **Edit Settings** window pops up.
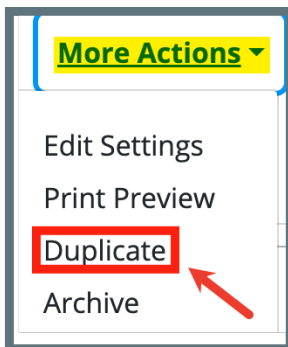
Figure 12: Duplicate a Template

7.2   Rename the template.

7.3   Update the fields as needed.

7.4   Click **Save**. The **Letter Template Management** page opens and the letter can be edited.

7.5   Click **Save** to save the template as a draft.

7.6   Click **Publish** to publish the template.

8.   Archive a Template

Purpose: To archive templates so that the template cannot be used.

Notes:

- Templates cannot be deleted. Archived templates can be reinstated for use if needed.

- Any user with Letter Template Administration permission can archive a template. Double check any template before archiving.

8.1   Select **Archive** from the **More Actions** drop-down menu. See *Figure 13, Archive a Template*. The **Are you sure?** window pops up.
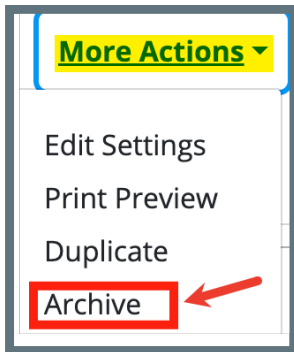
Figure 13: Archive a Template

8.2   Click **Yes, archive**. See *Figure 14, Are you sure? Popup*. The Letter Template Archived Notification opens. See *Figure 15, Letter Template Archived Notification.*

Figure 14: Are you sure? Popup

> ✅ "HEIST test" has been archived and is unavailable for use when generating letters from template.
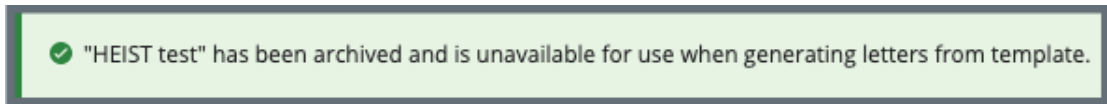
Figure 15: Letter Template Archived Notification

8.3   Reinstate an archived template

8.3.1   Go to the **Template Library**. Click **Show Advanced Search**.

8.3.2   Click **Archived** under **Status**.

8.3.3   Click **Search**.

8.3.4   Select the template to be reinstated

8.3.5   Select **Publish** or **Return as draft** from the drop-down menu under **More Actions**.

9.   Attach a Template to a Record

Purpose: To attach an existing published letter template to the corresponding provider, survey, intake or enforcement record.

9.1   Go to the specific provider, survey, intake, or enforcement record with which the letter is associated. Click **View Details**. The **Details** page opens.

9.2   Click **Letters** on the left menu. The **Letters** page opens.

9.3   Click **Add Letter**. The **Letter Overview** page opens.

   Note: If there is already an existing letter that can be reused, click **Generate from template** under the **Actions** drop-down menu and go to step 9.7.

9.4   Type the letter name under **Letter Name**. Add additional information, if desired.

9.5   Click **Save**. The **Letter: [Template Name]** page opens.

9.6   Click **Generate from template** under **Attachments**. The **Select a template** page opens.

9.7   Click the circle next to the desired template. See *Figure 16, Select a Template*.

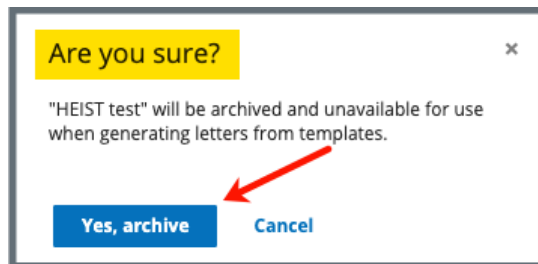|	ID ⇵	Letter Template Name ⇵	Description ⇵	Standardized ⇵
○	JIAM	A2 - Kite NS Letter - Survey	Nonstandardized survey letter with header/footer	No
◉		Andrea's Survey Template	Test	No
○		Burp-Collaborator-iFrame		No
○	8CLE	COPY-Burp-Collaborator-iFrame		No
○		Image-Test		No
○		LF_Template_Test		No
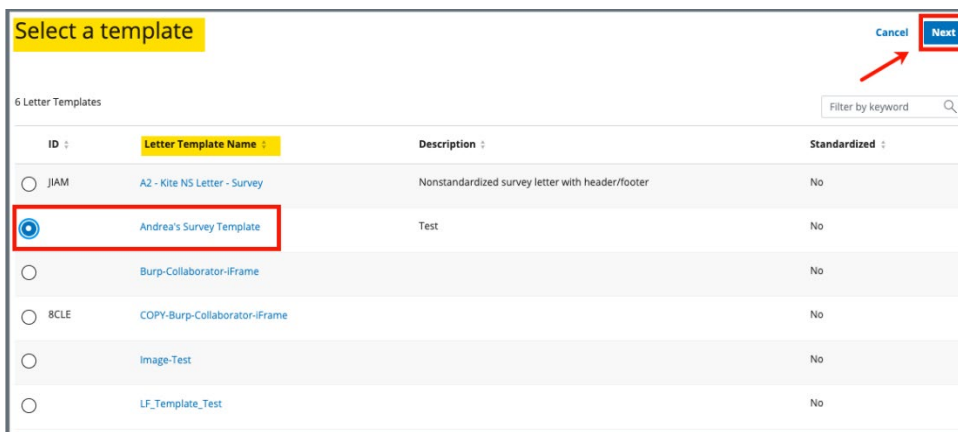
Figure 16: Select a Template

9.8   Click **Next**. The **Generate attachment from template** page opens.

9.9   Update the template as desired. See *Figure 17, Letter Template*.

Notes:

- Nonstandardized templates can be modified by any user.

- Textholders can be removed, words can be edited and updated.

- Text changes apply only to the current letter and not to the template. Refer to step 6, Edit a Template to edit the original template, if necessary.

- Standardized templates cannot be modified in the **Letters** section of any S&C area (provider, survey, intake, enforcement). To modify a standardized template, the template owner must edit the template in **Letter Template Management**.

Figure 17: Letter Template

1. **Print Preview**: Click **Print Preview** to preview the .pdf version of the letter. The letter can be downloaded from **Print Preview**, if desired.

2. **File Name**: Edit the template name.

3. **Description**: Enter keywords, if desired. Keywords are descriptive words that help the user find the content.

4. **Editor**: The Editor allows content to be edited, including formatting, bulleting, etc. See [Appendix A, Tips and Tricks for Working in a Template](), for up-to-date details on each icon in the editor.

5. **Letter**: Shows how the letter looks when generated.

6. **Generate attachment**: Click **Generate attachment** to create a .pdf that attaches to provider/survey/intake/enforcement record.

9.10   Click **Generate Attachment** to attach the letter to the record.

9.11   Verify the letter is attached under **File Name**. See *Figure 18, Letter Attachment.*
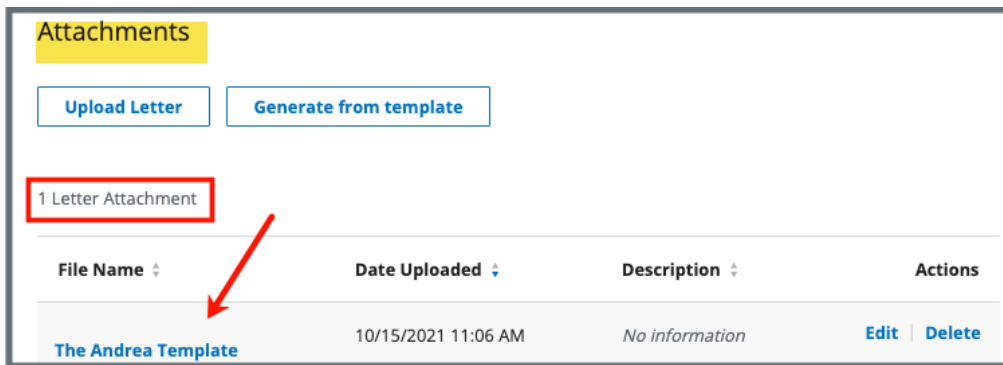
Figure 18: Letter Attachment

10. Create a Custom Text Prompt

Purpose: To create a custom textholder when it is necessary to add unknown specific information to a standardized letter. This prompt pops up when the template is attached to it's corresponding record and the desired data can then be added.

10.1   Open the letter template where the custom textholder needs to be added.

10.2   Select area in template where desired custom textholder will be inserted.

Note:

More than one custom textholder can be added to a letter template.

10.3   Click **Custom Text Prompt** from **Textholder Bank.** See *Figure 19, Custom Text Prompt Location.*

Notes:

- The letter template must be attached to the corresponding provider, survey, intake or enforcement record for the custom text prompt to generate the accurate data it represents.

- See Appendices B-E for a list of other textholders for each specific provider, survey, intake, or enforcement area.
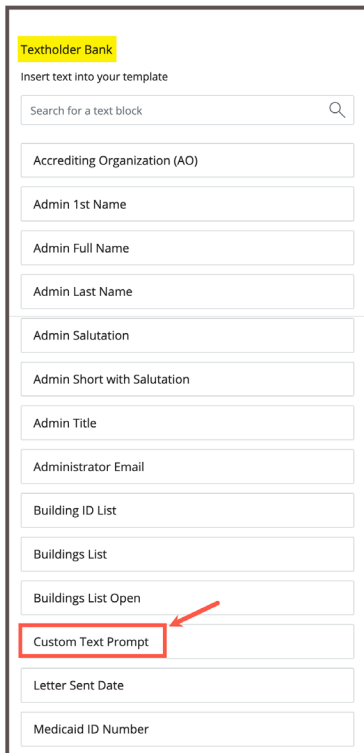
Figure 19: Custom Text Prompt Location

10.4   Edit the **User entered prompt** in the **Custom Text Prompt** formula with desired data. See *Figure 20, Edit Custom Text Prompt.*

Notes:

- Do not remove the quotation marks in the Custom Text Prompt formula.

- The **Custom Text Prompt** appears as an editable formula in the body of the letter.
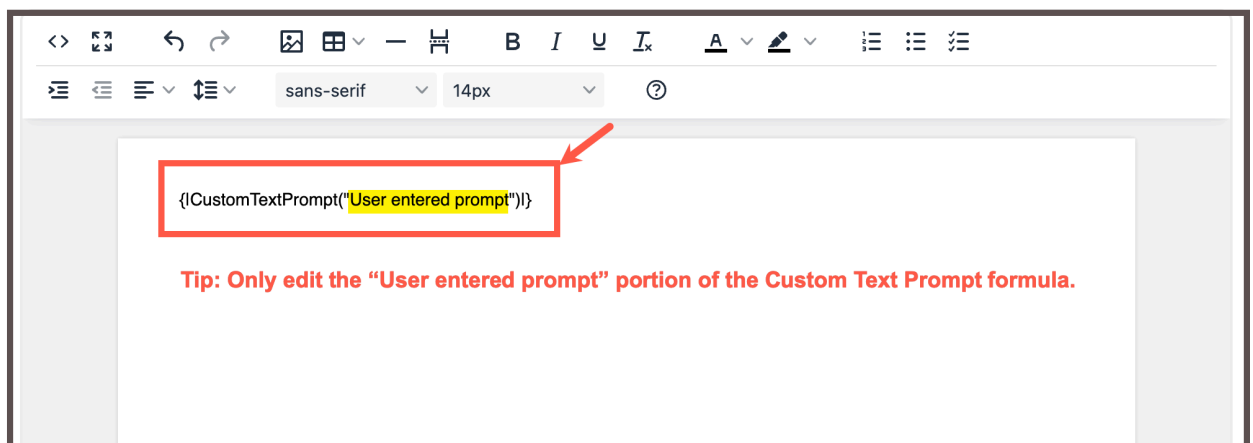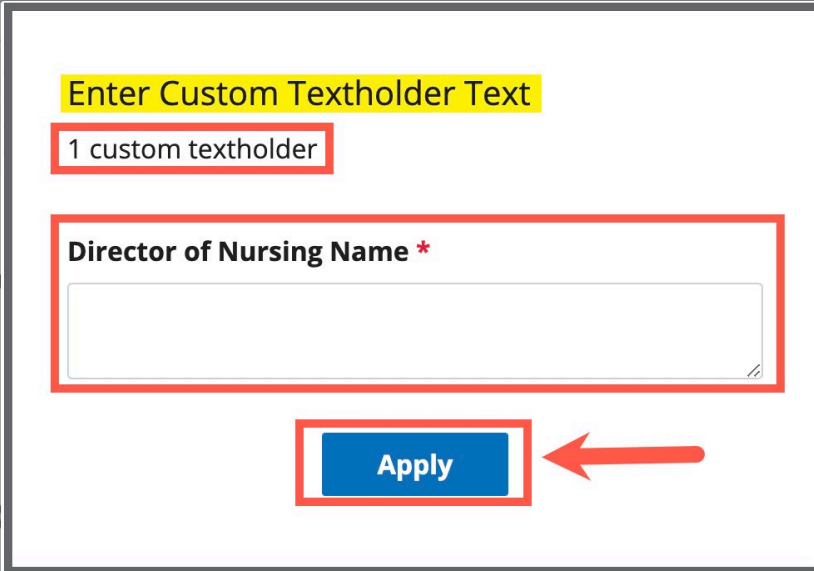
Figure 20: Edit Custom Text Prompt

10.5   Click **Save** to save template.

10.6   Attach the letter template to its corresponding provider, survey, intake or enforcement record.

   10.5.1   Go to the specific provider, survey, intake, or enforcement record with which the letter is associated.

   10.5.2   Click **View Details**. The **Details** page opens.

   10.5.3   Click **Letters** on the left menu. The **Letters** page opens.

   10.5.4   Click **Add Letter**. The **Letter Overview** page opens.

   10.5.5   Type the letter name under **Letter Name**. Add additional information, if desired.

   10.5.6   Click **Save**. The **Letter: [Template Name]** page opens.

   10.5.7   Click **Generate from template** under **Attachments**. The **Select a template** page opens.

   10.5.8   Click the circle next to the desired template.

   10.5.9   Click **Next**.

   10.5.10 The **Enter Custom Textholder Text** window pops up. See *Figure 21, Enter Custom Textholder Text Pop-Up Window*.

   10.5.11 Complete the prompt(s).

   10.5.12 Click **Apply**.

   10.5.13 The **Generate attachment from template** page opens.

Figure 21: Enter Custom Textholder Text Pop-Up Window

10.5.14 Click **Generate Attachment** to attach the letter to the record.

Appendix A: Tips and Tricks for Working in a Template

The letters template is very similar to working in Google Docs or Microsoft Word. Here are a few tips and tricks to help:

Template Menu
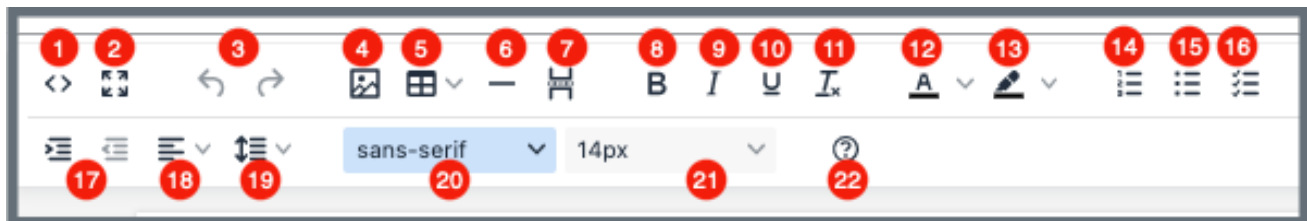
Figure 22: Template Menu

Hover over the template menu to see screen tips on what each of these icons are:

1. Show HTML code
2. Put document in full screen (make it bigger)
3. Undo/Redo
4. Insert an image. A small **Drop image** box opens. Drag and drop a file or click the box and search for the file.
5. Insert a table
6. Insert a horizontal line
7. Insert a page break
8. Highlight text and click to make **bold**
9. Highlight text and click to *italicize*
10. Highlight text and click to underline
11. Clear formatting
12. Highlight text and click to change text color
13. Highlight text and click to highlight text
14. Create a numbered list
15. Create a bulleted list
16. Insert a checklist
17. Indent/Remove indent
18. Alignment: Left, Center, Right, Justified
19. Adjust the line height
20. Select a font
21. Select a font size
22. Help: shows handy shortcuts, keyboard navigation, plugins and version

Appendix B: Provider Textholder Text

Each provider, survey, intake, or enforcement area has area-appropriate textholders. Provider Textholders are listed below.

Provider Textholders		
Accrediting Organization (AO)	Admin 1st Name	Admin Full Name
Admin Last Name	Admin Salutation	Admin Short with Salutation
Admin Title	Administrator Email	Building ID List
Buildings List	Buildings List Open	Custom Text Prompt
Letter Sent Date	Medicaid ID Number	Provider Address 1 (Street)
Provider Address 2	Provider CCN	Provider City
Provider Doing Business As	Provider Fax Number	Provider Full Address
Provider Legal Name	Provider Mailing Address	Provider State
Provider State ID (FACID)	Provider State License Number	Provider Telephone
Provider Type Abbrev	Provider Type Full Description	Provider Zip
Title (Mapped from Provider Certification & Licensure tab)	Today's Date	Today's Date Full

Appendix C: Survey Textholder Text

Each provider, survey, intake, enforcement area has area-appropriate textholders. Survey Textholders are listed below.

Survey Textholders		
Accrediting Organization (AO)	Admin 1st Name	Admin Full Name
Admin Last Name	Admin Salutation	Admin Short with Salutation
Admin Title	Administrator Email	Building ID List
Buildings List	Buildings List Open	Custom Text Prompt
Date # Days after Exit Date (Numbers)	Date # Days after Exit Date (Words)	Date # Days after Start Date (Numbers)
Date # Days after Start Date (Words)	Date CMS-2567 Issued	Date IDR Request Received
Event ID	Exit Date (Numbers)	Exit Date (Words)
Exit Date + 6 Months (Numbers)	Exit Date + 6 Months (Words)	Federal Survey Categories
First Revisit High Citations	Highest Scope/Severity (Disabled for Home Health Agencies(HHA))	IDR Conducted By
IDR Conducted Date	IJ Citations	Letter Sent Date
List Intakes For This Survey	List Level A Cites (Disabled for HHA)	List Survey Team
List Tag Numbers Only	List Tag/Surveyor Test	List Tags Cited
Medicaid ID Number	Observation Text (9999)	POC Due Date
POC Due Date in Words	Provider Address 1 (Street)	Provider Address 2

Survey Textholders		
Provider CCN	Provider City	Provider Doing Business As Name
Provider Fax Number	Provider Full Address	Provider Legal Name
Provider Mailing Address	Provider State	Provider State ID (FACID)
Provider State License Number	Provider Telephone	Provider Type Abbrev
Provider Type Full Description	Provider Zip	Revisit-Corrected Tags
Revisit-List New Tags	Revisit-List Repeat Tags	Start Date (Numbers)
Start Date (Words)	State Survey Categories	Survey All Tags IDR Status
Survey Extent(s)	Survey High Citations	Survey Purpose
Survey Regulation Type	Survey Revisits	Survey Revisits – Dates Only
Survey Team Leader	Survey Type	Third Visit Date
Title (Mapped from Provider Certification & Licensure tab)	Today's Date	Today's Date Full

Appendix D: Intake Textholder Text

Each provider, survey, intake, enforcement area has area-appropriate textholders. Intake Textholders are listed below.

Intake Textholders		
ALL – Allegation Text[with redact]	ALL – Allegation Text[without redact]	Accrediting Organization (AO)
Acknowledged	Activity Assignees	Admin 1st Name
Admin Full Name	Admin Last Name	Admin Salutation
Admin Short with Salutation	Admin Title	Administrator Email
Allegation Category	Alleged Event Date	Building ID List
Buildings List	Buildings List Open	Complainant Address
Complainant Names	Complainant Relationship (Primary)	Custom Text Prompt
Date # Days after Exit Date (Numbers)	Date # Days after Exit Date (Words)	Date # Days after Intake Date (Numbers)
Date # Days after Intake Date (Words)	Date # Days after Start Date (Numbers)	Date # Days after Start Date (Words)
Date # Days in Future (Numbers)	Date # Days in Future (Words)	Date # Working Days
Date CMS-2567 Issued	Date Follow-up Investigation	Date IDR Request Received
Date Received/Intake Start Date	Event ID	Exit Date (Numbers)
Exit Date (Words)	Exit Date + 6 Months (Numbers)	Exit Date + 6 Months (Words)

Intake Textholders		
Federal Survey Categories	First Revisit High Citations	Highest Scope/Severity (Disabled for HHA)
IDR Conducted By	IDR Conducted Date	IJ Citations
Intake ID/Complaint Number	Intake Recipient	Investigation Due Date
Investigation Due Date Long	Investigators	Letter Sent Date
List Intakes For This Survey	List Level A Cites (Disabled for HHA)	List Survey Team
List Tag Numbers Only	List Tag/Surveyor Test	List Tags Cited
Medicaid ID Number	Observation Text (9999)	POC Due Date
POC Due Date in Words	Primary Complainant	Provider Address 1 (Street)
Provider Address 2	Provider CCN	Provider City
Provider Doing Business As Name	Provider Fax Number	Provider Full Address
Provider Legal Name	Provider Mailing Address	Provider State
Provider State ID (FACID)	Provider State License Number	Provider Telephone
Provider Type Abbrev	Provider Type Full Description	Provider Zip
Reference	Revisit-Corrected Tags	Revisit-List New Tags
Revisit-List Repeat Tags	Start Date (Numbers)	Start Date (Words)
State Intake ID	State Survey Categories	Survey All Tags IDR Status
Survey Extent(s)	Survey High Citations	Survey Purpose
Survey Regulation Type	Survey Revisits	Survey Revisits – Dates Only

Intake Textholders		
Survey Team Leader	Survey Type	Termination – 23 Days
Termination – 90 Days	Third Visit Date	Title (Mapped from Provider Certification & Licensure tab)
Today's Date	Today's Date Full	

Appendix E: Enforcement Textholder Text

Each provider, survey, intake, enforcement area has area-appropriate textholders. Enforcement Textholders are listed below.

Enforcement Textholders		
Accrediting Organization (AO)	Admin 1st Name	Admin Full Name
Admin Last Name	Admin Salutation	Admin Short with Salutation
Admin Title	Administrator Email	All CMPs
Building ID List	Buildings List	Buildings List Open
CMP Collection Number	CMP First CMS Notice Date	Changes from IDR
Changes from IDR (No Status)	Custom Text Prompt	Cycle Start + 3 Months
Cycle Start + 6 Months	Date Facility out of Compliance	Federal CMP Amount Due
Federal CMP(s)	Latest Denial of Payment Remedy	Letter Sent Date
Medicaid ID Number	NATCEP/Nurse Aide Training Ban Last Loss Date	NATCEP/Nurse Aide Training Ban Loss Date
Next Licensure Letter Remedies	Per Day CMP(s)	Per Instance CMP(s)
Provider Address 1 (Street)	Provider Address 2	Provider CCN
Provider City	Provider Doing Business As Name	Provider Fax Number
Provider Full Address	Provider Legal Name	Provider Mailing Address

Enforcement Textholders		
Provider State	Provider State ID (FACID)	Provider State License Number
Provider Telephone	Provider Type Abbrev	Provider Type Full Description
Provider Zip	Recommended Federal CMP(s)	Remedies with State Recommended Effective Date
Remedy List	Remedy List – All Federal	Remedy List – In Effect
Remedy List – Not in Effect	Remedy List – Pending	Remedy List – Recommended
Survey High Citations	Title (Mapped from Provider Certification & Licensure tab)	Today's Date
Today's Date Full		