Table of Contents
1  Welcome.......................................................................................................................... 1
   1.1  QSEP User Manual................................................................................................. 1
2  Supplemental Information.............................................................................................. 2
3  Selecting QSEP Courses ............................................................................................... 2
   3.1  The QSEP Training Catalog ................................................................................ 2
4  Getting Full Access ........................................................................................................ 4
   4.1  QSEP Roles ........................................................................................................... 4
   4.2  Signing Up ............................................................................................................. 6
      4.2.1  User Role ......................................................................................................... 6
      4.2.2  Requesting a Role ......................................................................................... 6
      4.2.3  Role Choices ................................................................................................. 11
   4.3  Support .................................................................................................................. 12
      4.3.1  Contact QSEP Help Desk ............................................................................. 13
      4.3.2  Frequently Asked Questions .......................................................................... 14
      4.3.3  Change and Reset Password ......................................................................... 15
      4.3.4  Update My Personal Information .................................................................. 15
   4.4  My Profile ............................................................................................................... 17

1  Welcome
The QSEP provides a single location for all Centers for Medicare & Medicaid Services (CMS) Quality, Safety & Oversight Group (QSOG) training documentation, administration, reporting, and tracking.

1.1  QSEP User Manual
Select “User Manual” at the top of any QSEP page to access the User Manual.

The online User Manual is the current version. Although the manual is available in printed form, please be sure to check for updates by consulting the online version.
2 Supplemental Information

At the base of each page in QSEP, CMS provides links to sources of information related to the training. They are grouped into lists at the base of each page.

The first is a list of CMS and HHS websites that provide official information on government healthcare programs and resources.

The second is a list of tools, such as a list of healthcare acronyms and a glossary of terms.

The third list includes helpful links to CMS policies and links to important Federal programs such as the Freedom of Information Act.

Finally, at the bottom right corner of every page is our contact information. If you have any questions or need guidance, our telephone number, email address, and street address are there for your convenience.

3 Selecting QSEP Courses

The public QSEP course catalog provides access to all training, organized alphabetically:

1. View the Training Catalog to find the training information. Selecting a letter in the listing at the top of the page takes you to courses starting with that letter. Selecting a training plan icon at the left side of the page will limit the display to the courses in that training plan.

2. Beside the course name will be the approximate duration of the training. Launch the courseware using the “Launch” button beside the training name. Some courses will have Specific conditions, such as a browser restriction or the requirement to run a specific video format. If so, a yellow warning icon will appear at the right side of the listing. Hover your cursor over the icon to read the requirements.

3. QSEP will not track your progress or award certificates for completion. Courses that have not been completed cannot be saved and returned to later.

3.1 The QSEP Training Catalog
Courses can be accessed through the Training Catalog link. Selecting “Training Catalog” opens the screen shown below.

A list of courses appears in the main window (outlined in red).

Hover over a listing to show information about the training (See below).

Beside the course name is the approximate duration of the training, and a launch button. If the course has other restrictions, such as requiring a specific browser or access to a specific video format, a yellow warning icon will appear on the right side of the main window beside the listing. Hover over the icon to read the restriction before launching the training.

Use the navigation bar above the main window to find training by letter (outlined in yellow above). Selecting a letter will display trainings beginning with that letter. The “Search” field can also be used to locate a specific training (outlined in blue).

A list of training plan icons is displayed on the left side of the screen (outlined in green, above). Selecting an icon will limit the courses displayed in the main window to courses within that training plan. Hover your cursor over the icon to view the training plan name. The default is “View All.”
Selecting the PDF Export icon will open a popup giving the option to print the selected plan to a local printer or save a PDF version to your desktop (see above).

4 Getting Full Access

The QSEP provides learners with access to training created for CMS Surveyors. There is no need to create an account if your intent is to browse content or if you don’t require credit for courses taken or need to track your progress or maintain a transcript. Access to more QSEP features requires you to create an account with the HCQIS Access Roles and Profile (HARP) system and choose a user role and agency.

For example, if you require a certificate of completion for a specific course or courses, or you need to take Quality Improvement Training, you must create a HARP account. When requesting a user role, select the “Public User with Certificate” role. For “Agency,” select “General Public.”

4.1 QSEP Roles

Every registered QSEP user will have both a role and an agency. Roles include State Surveyors, State Managers and Administrators, Federal Surveyors, Regional Managers and Administrators. Agencies include Federal Regions, States, CMS, or General Public. Some roles access features such as administrative tools or learner reports, which may be limited according to the user’s agency. All agencies have Security Officials who will approve or deny requests for access.

Public users include general users browsing the Training Catalog, Healthcare Providers, and other users who are not surveyors but require credit for specific courses found in QSEP. More information about Roles and Agencies can be found in the table below. If you have any questions, please contact the Help Desk. (helpdesk@QSEP.org)
<table>
<thead>
<tr>
<th>User Role</th>
<th>Agency Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public User</td>
<td>General Public</td>
<td>Allows members of the general public to browse the Training Catalog and take online courses in any order.</td>
</tr>
<tr>
<td>Public user with Certificate</td>
<td>General Public</td>
<td>Allows members of the general public to browse Training Plans, take online courses in any order, and receive a certificate.</td>
</tr>
<tr>
<td>State Surveyor</td>
<td>State (any)</td>
<td>Allows CMS sponsored State surveyors to assign Training Plans to themselves and take online courses.</td>
</tr>
<tr>
<td>State Non-Surveyor</td>
<td>State (any)</td>
<td>Allows State Agency members to browse Training Plans and take online courses in any order.</td>
</tr>
<tr>
<td>State Manager</td>
<td>State (any)</td>
<td>Allows State Managers to browse Training Plans and take online courses in any order. Provides access to reporting functions (data access limited to their specific state).</td>
</tr>
<tr>
<td>State Training Coordinator</td>
<td>State (any)</td>
<td>Allows an STC to browse Training Plans and, take online courses in any order. Provides access to reporting functions (data access limited to their specific state).</td>
</tr>
<tr>
<td>Federal Surveyor</td>
<td>Federal Region</td>
<td>Allows CMS sponsored Federal surveyors to assign Training Plans to themselves and take online courses.</td>
</tr>
<tr>
<td>Federal Non-Surveyor</td>
<td>Federal Region</td>
<td>Allows Regional Office employees to browse Training Plans and take online courses in any order.</td>
</tr>
<tr>
<td>Regional Training Administrator</td>
<td>Federal Region</td>
<td>An RTA may browse Training Plans and take online courses in any order. Access includes reporting functions (data access limited to their specific region).</td>
</tr>
<tr>
<td>Regional Office Manager</td>
<td>Federal Region</td>
<td>The Regional Office Manager may browse Training Plans and take online courses in any order. Access includes reporting functions (data access limited to their specific region).</td>
</tr>
<tr>
<td>Central Office QSED Admin</td>
<td>CMS</td>
<td>The CMS administrator may browse Training Plans and take online courses in any order. Includes limited access to administrative functions and full access to reporting functions (ALL states/ALL regions).</td>
</tr>
<tr>
<td>Central Office QSOG Admin</td>
<td>CMS</td>
<td>The Central Office QSOG Manager may browse Training Plans and take online courses in any order. Includes access to reporting functions (ALL states/ALL regions).</td>
</tr>
<tr>
<td>Non-Surveyor</td>
<td>CMS</td>
<td>May access and review courses without taking pre-requisites. (Instructor Access).</td>
</tr>
<tr>
<td>Security Official</td>
<td>Any Agency</td>
<td>Reviews role requests for an agency.</td>
</tr>
</tbody>
</table>
4.2 Signing Up

Use the “Sign Up” link on the home page (see below) to go to HARP, where you can establish an account and a user role that will allow you to access more QSEP features.

4.2.1 User Role

Full access to QSEP requires an account with the HCQIS Access Roles and Profile (HARP) system. Once a HARP account is created, a user must be assigned a role in QSEP. New role requests will be approved by a Security Official. Each agency has a Security Official who will be responsible for approving role requests. Access to QSEP is granted once the user has been notified that their role request has been approved. If a role is pending, no changes to the request can be made, and no new requests can be made until the pending role is approved or denied.

The Security Official role is different from the other user roles in QSEP. The Security Official approves or denies role requests for the QSEP users in their agencies. Agencies are encouraged to have multiple security officials. A QSEP user may only have one role, unless the second role is Security Official. However, a user may be a Security Official for their agency without holding another role in QSEP. A Security Official performs their function through HARP. Information about that function may be found here:

https://www.youtube.com/watch?v=cBtjA5S1eE4&list=PLaV7m2-zFKphoCxi7sIx2G1fwMZQQ0EJP&index=5

Users may request a change to their role within their current agency through the My Profile page. To change agencies, contact the QSEP Help Desk.

4.2.2 Requesting a Role

Once a HARP account has been created, users will use the QSEP Login button located on the QSEP homepage.
A new HARP Sign In page will appear.

After entering Username and Password, users will be directed to a new multi-factor authentication (MFA) screen.
Once MFA is verified, users will be redirected to QSEP. During the first attempt to sign in, if the user’s HARP email credentials match their previously used email credentials as provided in the Integrated Surveyor Training Website (ISTW), the user will automatically be assigned that same role in QSEP. If the email credentials differ, the user will be redirected to the Sign Up/Request Access page shown below.
Users with an ISTW account will complete the left side of the page (Sign Up).

1. Enter your ISTW User ID.

   The First Name and Last Name fields will be pre-filled out from your HARP account profile.

2. Select the Sign Up button.
If all three of these fields match your record in ISTW, your user role from ISTW will be applied to your QSEP account.

New users or users unable to be matched to an ISTW role will use the right side of the page (Request Access).

1. Use the drop-down menus to select your Agency and User Role.
2. Use the radio button to indicate if you are a Security Official. If you are only a security official, all you need to select is your Agency and the Security Official button.

Users with a Surveyor ID have the option of entering it in the Surveyor ID field. This is not a mandatory field.

3. Select the Request Access button.

Users will receive an email that their role request is pending. The My Profile page will identify role requests pending until final approval. The Security Official will review the request and either approve or deny. Approval notification will be sent via email.
4.2.3 Role Choices

Users can request a new role by selecting a new role from the drop-down list on the Role Request form. A new role cannot be requested while a role request is pending. If the role is Security official, select the Security Official box below the User Role drop-down list.

When the form is complete, select the Request Role button.
Access to QSEP is granted once the user has been notified that their request has been approved by a Security Official. Users may have only one role in the QSEP, unless the second role is Security Official.

4.3 Support

After a role has been requested, the Support Page will be available from the Main Navigation Ribbon. Select “Help Desk” from the “Help” drop down menu in the main navigation ribbon on any QSEP page to get access to Support.
You will have access to the Help Desk and FAQ files, as well as links to change your password and update your profile.

4.3.1 Contact QSEP Help Desk
From the Support page located under the Contact QSEP Help Desk section, users can select the Contact QSEP Help Desk button to submit a Help Desk ticket.

In addition to their contact information, users should complete the Help Desk ticket with the following details: Issue, Subject, Message, and File Attachment (optional). There is an Issue drop-down menu to select from the following:
Users must select the check box at the bottom of the form labeled *I’m not a robot*, then select the Send button at the bottom of the form. An auto-response email will be sent to you confirming the receipt of your support ticket along with a case number for future reference.

The QSEP Help Desk is available Monday–Friday, 8 AM–7 PM Eastern Time and can be reached toll-free at 855-791-8900 or by email at helpdesk@QSEP.org.

4.3.2 Frequently Asked Questions
From the Support page located under Frequently Asked Questions (FAQs) section, users can select the FAQ button to view answers to common issues. The FAQs include both training and technical questions.
4.3.3 Change and Reset Password
From the Support page located under the Change My Password section, users can select the Change My Password button which prompts the user to enter their email address in the box provided, followed by selecting the Send Email button.

Users will receive a Success! message if their account was identified. The message will provide users with next steps to reset their password.

For additional information to reset your password select the link below:

https://www.youtube.com/watch?v=CXt1lEiARAs&list=PLaV7m2-zFKphoCXj7sIx2G1fwMZQQ0EJP&index=4&t=14s

4.3.4 Update My Personal Information
From the Support page located under the My Personal Information section, users can select the Update My Personal Information button to Login to their HARP account and conduct Two- Factor Authentication.
Once the user’s identity has been verified, they have the option to Edit their HARP Profile Information, Change Password, update their Challenge Question, and Add Device for two-factor authentication. If your QSEP session is still active, you may go back to QSEP using the back button on your browser. If the session has expired, you will be required to login to QSEP again.
4.4 My Profile

When you have established an account, information about your account will be found on the “My Profile” page. The My Profile page is accessed from the main navigation ribbon drop-down menu under your name. Access will be restricted to this page until your role has been approved.

From the left pane of the My Profile page, you can update your personal information: telephone number and email address, and change your password from the Change My Password button.

The center pane displays your HARP ID and Learner ID, and below that is your assigned user role and agency. From this pane you can request another user role (provided your current role is not pending) from the drop-down menu within your agency. You may request the Security Official role by selecting the check box near the bottom of the center pane. You may only hold one role at a time, unless your second role is Security Official. Choosing the Request Role button will send your request to the appropriate Security Official for approval. To change agencies, you must contact the QSEP Help Desk.
My User Roles:
- Pending: State Surveyor

My Agency:
- Maryland

*Fill out the form below to change your User Role. If your Role will be Security Official, check the “security official” checkbox. To change the Agency in your profile, please contact the QSEP Help Desk.

User Role

Please Select

Security Official

Request Role