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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, so please be sure to check for updates by consulting the online version. The User Manual displayed will correspond to a user’s assigned role.

The Help Menu also contains a link to User Training Videos

And Frequently Asked Questions.
2 Supplemental Information

At the bottom of each page in QSEP, CMS provides links to resources. They are grouped into the following five sections: CMS & HHS Websites, Tools, Helpful Links, CMS Contact Information, and Social.

1. CMS & HHS Websites provide official information on government health care programs and resources.
2. Tools provide a list of health care acronyms, FAQs, and a glossary of terms.
3. Helpful Links provide access to CMS policies and Federal programs such as the Freedom of Information Act.
4. CMS Contact Information displays the CMS mailing address.
5. Social provides access to CMS’ Twitter, Facebook, YouTube, LinkedIn, and RSS Feeds and Podcasts.

3 Selecting Training

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 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). 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.” Hover over a listing to show information about the training (See below).
QSEP User Guide: Public

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.

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. Providers may access the training catalog directly from the QSEP main page by selecting the “I am a provider” button (see below).
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 of completion.</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>An STC 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 Administrator</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>
</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.

<table>
<thead>
<tr>
<th>User Role</th>
<th>Agency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Office QSOG Manager</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>

4.2.1 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:

Security Official Information

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 request pending until final approval. The Security Official will review the request and either approve or deny. Approval or denial notification will be sent via email.
4.2.1 Role Choices

Users can request a new role by selecting a new role from the drop-down list on the Role Request form. 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 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.
4.3.1 Contact the 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.

When entering contact information, users must re-type their email address for confirmation. This field cannot be filled in by copy and paste.
In addition to contact information, complete the Help Desk ticket with the following details: Issue Type, A short description (100 Characters) of the problem, and a detailed description (4000 Character limit). The Issue Type drop-down menu is shown below:

![Issue Type Drop-down Menu]

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.

To attach a screen shot of the error message or to add any other documentation for consideration by the Help Desk, reply to the confirmation email and attach the files to that message.

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. The FAQs can also be found in the “Help” menu on any page.

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 sends the user to the password change form in their HARP account. Fill out the form, (shown below) and select “Save”.

![Password Change Form]
Users will receive confirmation that their password has changed.
For additional information about resetting your password select the link below:

Information about resetting a password

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.

To change your multi-factor authentication (MFA) methods, select Two-Factor Devices at the top left side of the User Profile screen.

The first listing will be your primary verification method. The default selection is email. To change the devices linked to your account, select “Remove” beside either selection, then make another selection from the drop-down menu under “Device Type” (see above in red).
4.4 My Profile

The My Profile page is accessed from the main navigation ribbon drop-down menu under your name.

From the left pane of the My Profile page, you can update your personal information: telephone number and email address, as well as add a photo or avatar to your QSEP account, and change your password from the Change My Password button (See also section 4.3.3, Change and Reset Password).

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 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.