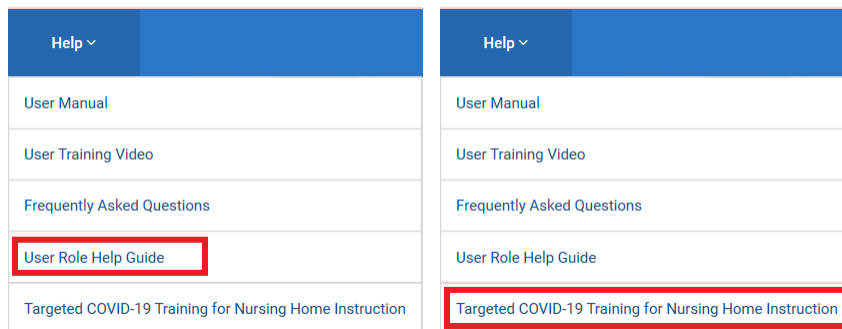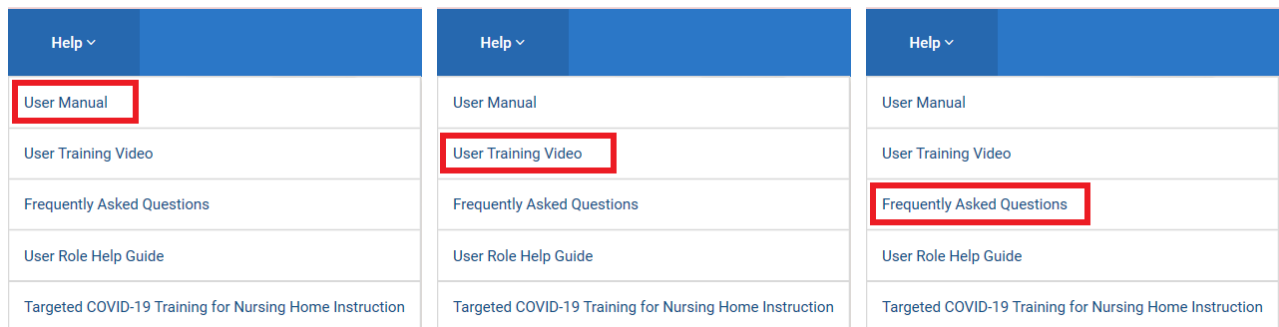# Table of Contents

1   Welcome

This manual will help you navigate the tools and features of the Quality, Safety & Education Portal (QSEP). We welcome your feedback to aid us in improving this system. If you have comments about this manual or QSEP, please send an email to helpdesk@QSEP.org.

1.1   QSEP Overview

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

1.2   User Manual and Help Menu

Select User Manual from the drop-down menu under "Help" at the top of any QSEP page to access the User Manual, User Training Video, Frequently Asked Questions, User Role Help Guide and Targeted COVID-19 Training For Nursing Home Instructions. The online User Manual is the current version, so please be sure to check for updates by consulting the online version. The help menu includes selections for the User Manual, a User Training Video, Frequently asked Questions (FAQ), a User Role help guide, and instructions for Targeted COVID-19 Training for Nursing Homes.

Help ⌄		Help ⌄		Help ⌄
User Manual		User Manual		User Manual
User Training Video		User Training Video		User Training Video
Frequently Asked Questions		Frequently Asked Questions		Frequently Asked Questions
User Role Help Guide		User Role Help Guide		User Role Help Guide
Targeted COVID-19 Training for Nursing Home Instruction		Targeted COVID-19 Training for Nursing Home Instruction		Targeted COVID-19 Training for Nursing Home Instruction

Help ⌄		Help ⌄
User Manual		User Manual
User Training Video		User Training Video
Frequently Asked Questions		Frequently Asked Questions
User Role Help Guide		User Role Help Guide
Targeted COVID-19 Training for Nursing Home Instruction		Targeted COVID-19 Training for Nursing Home Instruction

The QSEP Help Desk is also available to help you 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. That

1.2.1 SETI and SADOC Registration

The QSEP home page contains a link to the registration site for the Survey Executives Training Institute (SETI) and State Agency Director Orientation Course (SADOC) events. The link appears next to the help menu at the top of the QSEP home page. To register for one of these events, follow the link to the registration site (see below).

1.3   User Roles

All QSEP users must establish their user identity and choose a user role before gaining access to QSEP. Providers and learners such as educators, accrediting organizations, advocacy groups, HHS employees or contractors, and quality improvement organizations must fill out a form to establish their identity using their email address and identify their role in QSEP. Users from CMS and Federal and State agencies are required to establish an identity and account with the HCQIS Access Roles and Profile (HARP) system. If a user requires a CMS user role, that will require registering in the HARP system. These roles are for CMS and State Agencies, and they have more detailed training and security requirements. Once their user role has been determined, Providers are directed to the Training Catalog where all available training is listed alphabetically. CMS and State Agency users are directed to HARP and returned to The Training Catalog, where they can select Training Plans. A list of roles and descriptions for QSEP users is shown below.

User Roles	Description	Organization
Public User	Allows members of the general public to browse the Training Catalog and take online courses.	Public
Provider/Supplier	Allows Providers/Suppliers to browse the Training Catalog, take online courses and receive a certificate.	Public
Accrediting Organization	Allows Accrediting Organization users to browse the Training Catalog, take online courses and receive a certificate.	Public
Quality Improvement Organization	Allows Quality Improvement Organization users to browse the Training Catalog, take online courses and receive a certificate.	Public

HHS Employee/Contractor	Allows HHS Employees/Contractors to browse the Training Catalog, take online courses and receive a certificate.	Public
Advocacy Group	Allows Advocacy Group users to browse the Training Catalog, take online courses and receive a certificate.	Public
Educator/Author/Researcher	Allows Educator/Author/Researcher users to browse the Training Catalog, take online courses and receive a certificate.	Public
State Surveyor	Allows CMS sponsored surveyors to assign themselves Training Plans and take online courses. This role represents the majority of the QSEP user community.	State Government
Federal Surveyor	Allows CMS Federal surveyors to assign themselves Training Plans and take online courses.	CMS
State Non-surveyor	Allows State Agency members to browse Training Plans and take online courses in any order.	State Government
Federal Non-Surveyor	Allows Regional Office employees to browse Training Plans and take online courses in any order.	CMS
State Manager	Allows a State Manager to browse Training Plans and take online courses in any order. Provides access to reporting functions. (data access limited to specific state)	State Government
Regional Office Manager	Allows Regional Office Managers to browse Training Plans and take online courses in any order. Provides access to reporting functions (data access limited to specific region).	CMS
Central Office QSOG Manager	Provides access to reporting functions for CMS management staff (data access for **all** states and **all** regions).	CMS
State Training Coordinator	Allows STCs to browse Training Plans and take online courses in any order. Provides access to reporting functions (data access limited to specific state). Provides limited access to administrative functions.	State Government
Regional Training Administrator	Allows RTAs to browse Training Plans and take online courses in any order. Provides access to reporting functions (data access limited to specific region). Provides limited access to administrative functions.	CMS
Central Office QSED Administrator	Allows CMS Administrators to browse Training Plans and take online courses in any order. Provides limited access to administrative functions. Provides access to reporting functions (**all** states/**all** regions).	CMS

1.4   CMS and State Agency Sign Up

Use the "Sign Up" link for CMS and State Agencies 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.
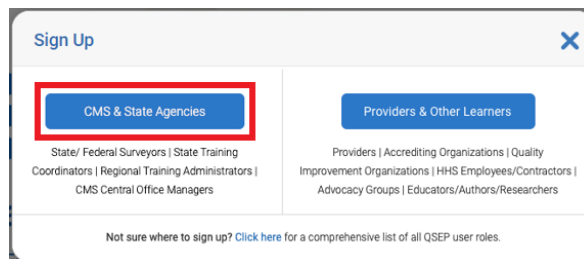
1.4.1 User Roles and HARP

Full access to QSEP for CMS and State Agencies 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
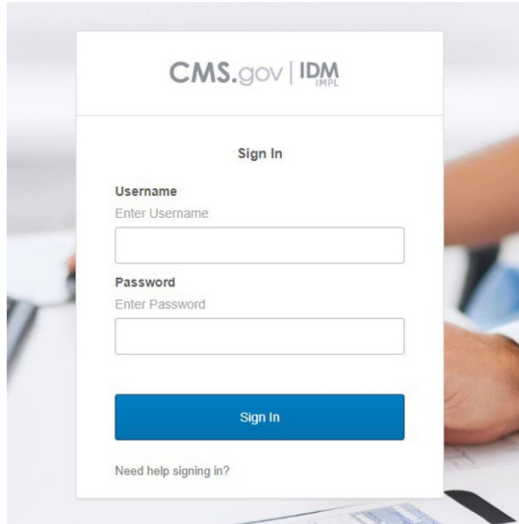
Users may request a change to their role within their current agency through the My Profile page. To change agencies, contact the QSEP Help Desk.

1.4.2 Requesting a Role

CMS and State Agency users must fill out a role request. Once a HARP account has been created, users will use the QSEP Login button located on the QSEP homepage.
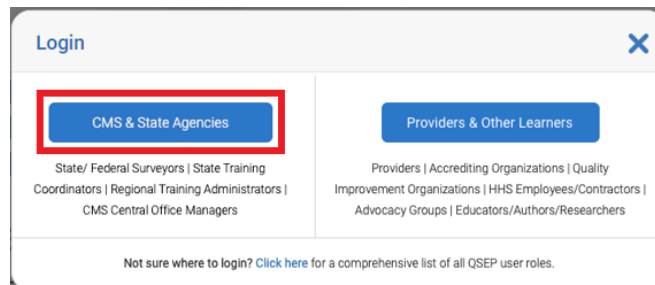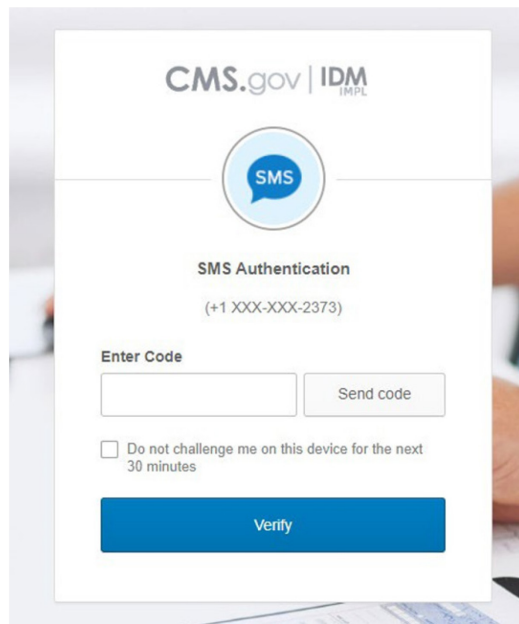
A new HARP Sign In page will appear.

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.

1.4.1 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.

1.5 Provider/Supplier and Other Learners Sign Up

Sign up by selecting "Sign up" under "Providers & Other Learners" on the home page. If you are unclear about the role you should choose, select the link at the bottom of the "sign up" window to view a list of roles.

The next page is the form used to identify the user.

Fill out the first name, last name, and email address at the top of the form, and re-enter the email address to verify it. Select a role from the list of user roles at the bottom of the form.

That selection may require additional information to be entered in the following screens. When the form is complete, select the blue "Next" button at the bottom of the window.

Most users must supply more information based their choice of user role. See the section below corresponding to the user role selection to find the information required to complete the QSEP Sign Up process.

1.5.1 Provider/Supplier

Provider/Suppliers select their Provider/Supplier information from the drop-down menu on their information page. Provider/Supplier types are:

Acute Care Hospitals

ASC - Ambulatory Surgical Center

CAH - Critical Access Hospital

CLIA/Labs

CMHC - Community Mental Health Center

CORF - Comprehensive Outpatient Rehabilitation Facility

ESRD - End Stage Renal Disease Facility

FQHC - Federally Qualified Health Center

HHA - Home Health Agency

HOSP - Hospital

HSPC – Hospice

ICF/IID - Intermediate Care Facilities for Individuals with Intellectual Disabilities

OPO - Organ Procurement Organizations

OT/SP - Occupational Therapy / Speech Pathology

PACE - Programs of All-Inclusive Care for the Elderly

PRTF - Psychiatric Residential Treatment Facility

PSYC - Psychiatric Hospital

PTF - Physical Therapy Facility

RHC - Rural Health Center

RNHI - Religious Nonmedical Healthcare Institutions

SNF/NF - Skilled Nursing Facilities/Nursing Facilities

Swing-Bed Hospitals

TRAN - Organ Transplant / Except Kidney

XRAY - Portable X-Ray Services

After choosing the provider type, select "Facility Lookup" to identify your facility (in red, below) then select "next".

The facility lookup screen appears. Select from among the criteria in the Facility lookup screen. One or more of the fields, Facility CCN, Facility Name, Facility Zip Code and Facility State must be filled in. When the search criteria are entered, select "Search" (in red, below).

The results of the provider lookup are displayed in the Provider/Supplier information page. If the correct facility appears in the listing in the center of the screen. If the correct facility is in the list, select the "Select Facility" button (in red, below).

If the desired facility is not in the list, the options are to either select the "Search Again" button (outlined in green, above) which returns the user to the facility lookup page to try different search parameters or contact the QSEP help desk at 1-855-791-8900. After selecting a facility in the list, select the "next" button at the bottom of the window (in blue above).

The next page is a confirmation page. Confirm the name, address and CMS Certification Number (CCN) number then select "Next" at the base of the window. Select the option to "Search Again" at the right side of the window if the information is incorrect.

A confirmation email is sent with a link to the QSEP training catalog. If a confirmation email has not been sent, contact the QSEP Help Desk at 1-855-791-8900.

1.5.2 Accrediting Organization

Accrediting Organizations must select their AO Type and AO Name on their information page. Select an AO Type from the drop-down menu at the left side of the form (see below, in red). After making a selection from the AO Type menu, make a selection from the AO Name menu (see below, in green).

AO Name Selections change according to the AO Type selection that is made. See the tables below for the AO Name selections according to the user's choice of AO Type:

When Non-CLIA is selected from the AO Type drop down menu:
Accreditation Association for Ambulatory Health Care (AAAHC)
Accreditation Commission for Health Care, Inc (ACHC)
American Association for Accreditation of Ambulatory Surgery Facilities (AAAASF)
American Osteopathic Association/Healthcare Facilities Accreditation Program (HFAP)
Center for Improvement in Healthcare Quality (CIHQ)
Community Health Accreditation Partner (CHAP)
DNV GL – Healthcare (DNV GL)
National Dialysis Accreditation Commission (NDAC)
The Compliance Team (TCT)

The Joint Commission (TJC)

When CLIA is selected from the AO Type drop down menu:
AABB
American Association for Laboratory Accreditation
Accreditation Association for Hospitals and Health Systems/Healthcare Facilities Accreditation Program (AAHHS/HFAP)
American Society for Histocompatibility and Immunogenetics
COLA
College of American Pathologists
Joint Commission

When CLIA (Exempt States) is selected from the AO Type drop down menu:
HSQA/IIO-Laboratory Quality Assurance
Clinical Laboratory Evaluation Program State of New York Department of Health

Select "Next" when the choices for AO Type and AO Name are made.

1.5.3 Quality Improvement Organization

Quality Improvement Organizations must select their QIO Name (In red, below):

Quality Improvement Organization

QIO Name:*

Please select an item ▾

< Back   Next >

Choose the QIO from the list (see below) then select "Next".

Please select an item
Area 1 - Livanta
Area 2 - KEPRO
Area 3 - KEPRO
Area 4 - KEPRO
Area 5 - Livanta
Alliant-Georgia Medical Care Foundation
Atlantic Quality Improvement Network
atom Alliance
Great Plains Quality Innovation Network
Health Services Advisory Group
Healthcentric Advisors
HealthInsight
Lake Superior Quality Innovation Network
Mountain Pacific Quality Health Foundation
Qualis Health
Quality Insights Quality Innovation Network
Telligen
TMF
VHQC

Please select an item ▾

This leads to the email confirmation page.

1.5.4 HHS Employee or Contractor

HHS Employees or Contractors must select their HHS Agency Name (In red, below):

Choose the HHS Agency from the list (see below) then select "Next".

This leads to the email confirmation page.

1.5.5 Advocacy Group

Advocacy Groups must select their Advocacy Group Name (In red, below):

Choose the Advocacy Group from the list (see below) then select "Next".

This leads to the email confirmation page.

1.5.6 Educator, Author or Researcher

Educators, Authors and Researchers must provide their state and organization name in their additional information page. Select a State/Territory from the pull-down menu (in red below) and type in the name of the organization (in green below).

The State selection (in red, above) includes other countries and territories as shown in the menu detail below.

Once the State is chosen, type in the Organization Name and select "Next" at the bottom of the page. This leads to the email confirmation page.

Once the additional information form is complete, select "next". A confirmation email is sent with a link to the QSEP training catalog. If a confirmation email has not been sent, contact the QSEP Help Desk at 1-855-791-8900.

1.6   Logging in to QSEP

After signing up, users enter QSEP by selecting the "Login" button on the QSEP home page. This opens a window that asks users to select an entry according to their role.

CMS and State Agency users use the button on the left (in red, below) Providers use the button on the right (in green, below).

CMS and State Agency users must be verified through the HARP system, while Providers login with their email. Selecting the login link either directs the user to the HARP system or opens a window for the user to enter their email. Once the login is verified, the user will be sent to the QSEP Training Catalog.
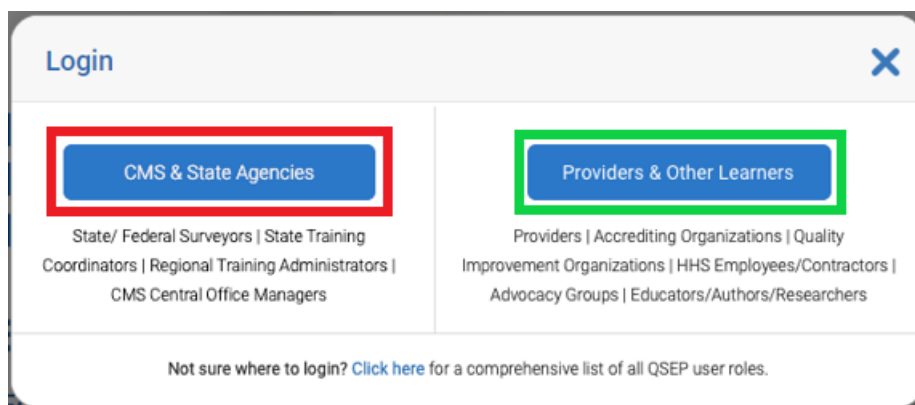
A list of QSEP roles is available by selecting the link at the base of the Login window.

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 QSEP course catalog provides access to all Provider training, organized alphabetically. Filters are provided to provide fast and easy access to the information you need. Providers entering QSEP will be directed to the Training Catalog when they enter.

3.1 The Training Catalog

From the Providers & Other Learners login page, you will be directed to the Training Catalog.

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 green above). Selecting a letter will display trainings beginning with that letter. Providers have tools to filter their catalog listings to find Provider Only

content (In yellow, above). Using the tools outlined in yellow above, select a Provider Type from the drop down menu on the right side of the page, then select Provider Only on the left side of the page to limit the courses displayed in the main window to those specific trainings.

Hover over a listing to show information about the training (See below).
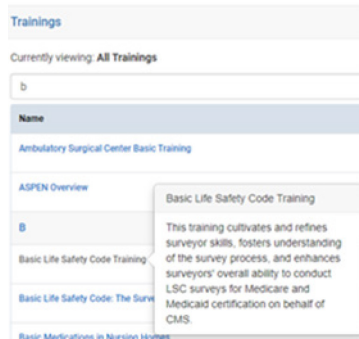
Beside the course name is the approximate duration of the training, CEUs available for the course, training progress, completion date, and an action button, used to launch or re-launch the course.


If the course is completed, an icon will appear next to the action button (see above). 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 (see below). Hover over the icon to read the restriction before launching the training.
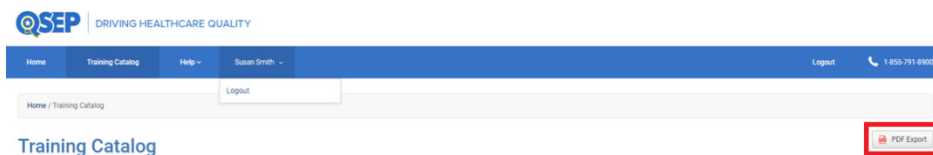
Selecting the PDF Export icon will open a popup giving the option to print the selected plan to a local printer or save a PDF version to your desktop (see above).

3.1.1 The Training Menu

Selecting either Launch or Re-Launch will open the Training Menu. The window contains links to the pre-test, training and post-test for that training.

Version 1
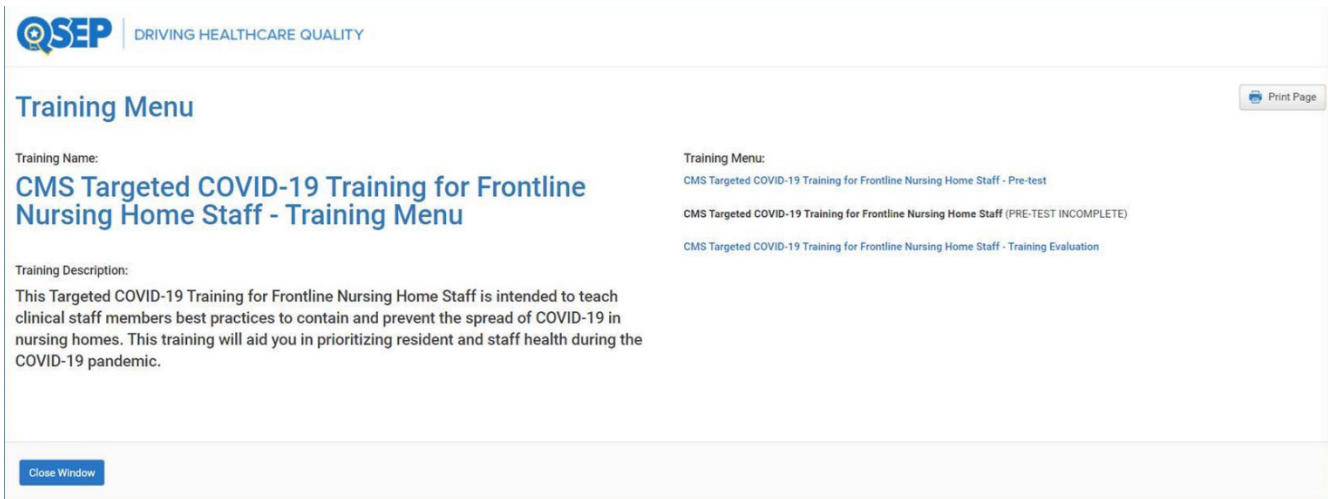
The window includes a description of the training on the left side of the page, while selections for training are on the right (see example above).

3.2   Targeted COVID-19 Training for Nursing Homes Evaluation Instructions

Skilled Nursing Facilities/Nursing Facilities providers are required to take either the *COVID-19 Training for Frontline Nursing Home Staff* or *COVID-19 Training for Frontline Nursing Home Management* through QSEP. Once the training is complete, the COVID-19 Evaluation must be completed.

The first 3 evaluation questions have specific instructions, shown below.

Question 1, Role: What is your Role in the nursing home?

Select either Clinical Staff or Management from the pull-down menu.

Question 2, Time since hire: Were you hired at your current nursing home within the past two weeks?

Select either Yes or No from the pull-down menu.

Question 3, Do you work at multiple CCNs?

Select either Yes or No.

If yes, use the link to the provider search tool to select up to 4 additional CCNs.

The CCN for your primary facility will be taken from your registration for QSEP. To add more CCNs, Select the Facility Search tool.

Selecting "Add Additional CCN" will open the Facility Search window. Enter information into the window and Select "Search".
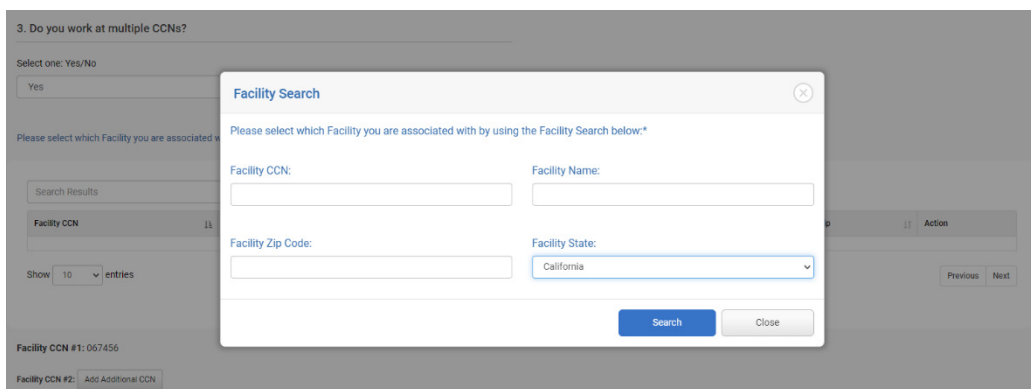
This will generate a list of facilities.

Facility CCN	Facility Name	Address	City	State	Zip	Action
051013	"COMMUNITY HEALTH CENTERS, LOMPOC"	425 W CENTRAL AVE STE 201-203	LOMPOC	California	93436	Select
051024	"ANDERSON VALLEY HEALTH CENTER, INC"	13500 AIRPORT ROAD	BOONVILLE	California	95415	Select
051046	"ALL FOR HEALTH, HEALTH FOR ALL, INC"	519 EAST BROADWAY	GLENDALE	California	91205	Select
051049	"ASIAN AMERICANS FOR COMM INVOL OF S CLARA CO, INC	"2400 MOORPARK AVENUE, SUITES 300 & 319"	SAN JOSE	California	95128	Select
051064	"COMMUNITY HEALTH CENTERS, CAMBRIA"	2515 MAIN ST STE B & C	CAMBRIA	California	93428	Select
051095	"CENTRO MEDICO, EL CAJON"	133 WEST MAIN STREET	EL CAJON	California	92020	Select
051096	"CENTRO MEDICO, COACHELLA"	55497 VAN BUREN STREET	THERMAL	California	92274	Select

Choose a facility from the list by selecting the "Select" button to the right of the Facility Name.

3. Do you work at multiple CCNs?

Select one: Yes/No

Yes ⌄

Facility CCN #1: 067456

Facility CCN #2: 051013 Clear

Facility CCN #3: Add Additional CCN

Facility CCN #4: Add Additional CCN

Facility CCN #5: Add Additional CCN

Continue to add additional facilities by selecting "Add Additional CCN".

Complete the remaining questions on the evaluation form. When completed, select the "Submit Evaluation" button at the bottom of the form. Once the evaluation is complete, users can return to the Training Menu and print their Certificate of Completion.

Version 1