This process applies only to the:

- QIES reports on the CASPER Reporting System
- QIES Workbench application
- ASPEN Web

OSCAR and other mainframe access request processes remain unchanged.

Two different applications are available to access QIES Reports; the CASPER Reporting System and the QIES Workbench application.

The CASPER Reporting System includes three major groupings of reports:

- MDS: Reports related to MDS assessment data,
- OASIS: Reports related to HHA assessment data
- Survey and Cert: Reports related to Survey and Certification data

The QIES Workbench application includes the same three major groupings of reports, but contains both facility- and patient-level data. **CAUTION:** The patient-level data available with the QIES Workbench application is Privacy Data, and great care must be taken when obtaining, storing and distributing this data. Only staff members with an actual business reason for access to the patient-level data (Privacy Data) should have this access.

The facility-level data is in the Survey and Certification (Includes ACTS Intake and Provider/Enforcement (AEM) Data), MDS QI and OBQI groups.

The QIES Workbench Data Groups which contain Patient-Level (Privacy) Data include MDS, MDS Swing Bed, OASIS, IRF-PAI, and ACTS Intake.

The Discoverer / Ad Hoc Reports report group is no longer used. The QIES Workbench is the only Ad Hoc tool available.

The MDS 30 DMS application is used by State and Help Desk personnel. State RAI and MDS Automation Coordinators are responsible for configuring State processing options (e.g. State preferences, HIV/STD ICD-9 Codes, RUGs, CMIs, State-collected assessment items), Assessment Merge/Split, and adding residents and vendors.

The ASPEN Web application is used to access the CLIA CMS-116 application.

**Step 1:** Requester completes the QIES National Data Access Request form. See "Important Notes."

**Step 2:** Requester’s Supervisor. The requester’s supervisor must approve the request for access.

**Step 3:** Requester must sign Privacy Act on request form. Use black or blue ink.

**Step 4:** Requester. Forward Original Forms.

  a. If Requester is associated with a State Agency, forward the original forms to that State Agency. Continue on with **Step 5.**
b. If the Requester is NOT associated with a State Agency, forward the original forms to the CMS Central Office. Continue on with Step 7.

**Step 5:** State Agency. Mail the original forms to the associated CMS Regional Office (OSCAR/QIES).

**Step 6:** Regional Office Approval. RO designated coordinator approves/denies request.

If approved:
- RO coordinator signs on the RO approval line.
- RO sends a list of approved requesters (the requester’s telephone number, email address, and which report categories/groups have been approved for each requester) via e-mail to Theresa Spady.
- RO keeps originals of access request forms.

If denied:
- RO/CO indicates, “denied” with signature on approval line of the form for the RO/CO authorizer.
- RO/CO keeps originals of access request forms

**Step 7:** CMS Central Office forwards approved requests to IFMC.

**Step 8:** IFMC emails the requester their user id and the phone number for the QTSO Help Desk where they can obtain their password.

**Important Notes**

- Users who currently have a QIES User ID/Password must still complete the “QIES National Data Access Request” form, sign the privacy statement, and forward for documentation purposes.
- If the request is for a new User ID, indicate this in the New User ID box.
- If the request is for additional access or to remove unneeded access indicate this by checking the Change Access box.
- State approving officials are also required to send “delete” information, via the request form, to the regional office when employees leave, change jobs, etc. Indicate this by checking the Delete User ID box.
- Password Help: If a user forgets their password, or a requestor wants status of an approved access request, they should call **QTSO Help Desk** at **1-888-477-7876**.