

# Step by Step Guide for Attaching Documents in Submitted ISS Surveys

## Attaching Additional Documents for Practice Comment Responses to the Library in the Interactive Survey System for Submitted Surveys

- A) Log on to NCQA's ISS (<https://iss.ncqa.org/RDSat/ATLogin.asp>) with your User ID and password for the survey tool(s).

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### Interactive Survey System

**PLEASE LOG IN**

User ID:

Password:

If you have forgotten your Password, enter your User ID continue.

To purchase a license to access this system, [click here](#) for details.

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You must use your user ID and password to log-in and attach documentation.

**NOTE:** Only the practice user with Administrative permissions can add additional documents to the survey tool after it has been submitted. Only one user can have Administrative permissions in a survey tool.

To change the Administrative User, complete the following steps:

1. Select **Administrative Functions** link.
2. Select **View/Edit User in User Pool** link.
3. Select **Add New User** button.

### Administration

- [Administrative Functions](#)
- [Change User Password](#)

### Administration Menu

**Manage Users**

- [Create New User in User Pool](#)
- [View/Edit User in User Pool](#)

**Other Administrative Functions**

- [View/Edit Organization Name](#)
- [View History of Changes](#)
- [Transfer Data from one Survey Tool to another Survey Tool](#)

Return to: [Administrative Menu](#)

## View/Edit Users

This screen allows you to create and view a list of potential users and to change attributes for existing users.

You may change passwords or email address or delete users who are no longer eligible to access the ISS.

To Create a New User, click on the gray box.

To update or alter an existing user, select from the User ID in the list below.

To send an email to a user, click on the user's email address.

**User ID:** This is the User ID created when the user was added. This cannot be edited. To update or edit attributes for a user, click on the User ID.

**First Name:** This is the user's first name. This can be edited using the Update User screen.

**Last Name:** This is the user's last name. This can be edited using the Update User screen.

**Email:** This is the user's email address. This link will allow you to send an email to this user. This can be edited using the Update User screen.

**Organization:** This is the organization for this user.

**Active?:** If the user appears as "Active," the user is available to be assigned to a product. If the user appears as "Inactive" on the list, you will not be able to assign this user to a product. This can be changed in the Update User screen.

**Valid From:** This field defaults to the date the license is created. This can be modified if you want to delay access. This can be changed in the Update User screen.

**Valid To:** This field defaults to a 5-year period. This can be changed if you want this user's privileges to expire earlier. This can also be extended, even beyond the valid time frame for the publication. This can be changed in the Update User screen.

User ID	First Name	Last Name	Email	Organization	Status	Valid	
						From	To
<a href="#">Add New User</a>							
<a href="#">AHRR</a>							
<a href="#">LCRR</a>							
<a href="#">P1000034503</a>			<a href="#">ssselb</a>				
<a href="#">TDANI</a>							

4. Select the Admin User ID, e.g., P1000034503, to change the owner information in the form.
5. Select **Update User**.

## Update User

This screen allows you to change attributes for users who have already been identified. To update, replace any information in the following fields that needs to be changed and click on "Update User." To remove a user from the list, select "Delete." Use the links above to return to the User Administration Menu or the Users List.

<b>User ID:</b>	There is no restriction on the length or mix of alpha/numeric characters of the user id. Once this screen is completed and saved, you will not be able to change it.
<b>Password:</b>	Passwords must be at least 8 characters in length and must also have 3 of the 4 following characteristics: <ul style="list-style-type: none"> <li>At least one uppercase character.</li> <li>At least one lowercase character.</li> <li>At least one numerical character.</li> <li>At least one symbol (i.e. #, \$, &amp;, etc.)</li> </ul>
<b>First Name:</b>	Enter the user's first name. This can be edited using the Update User screen.
<b>Last Name:</b>	Enter the user's last name. This can be edited using the Update User screen.
<b>Organization:</b>	This will be automatically completed unless you have administrative rights for more than one organization. In that case, select the organization for this user.
<b>Email:</b>	Enter the user's email address. This can be edited using the Update User screen.
<b>Valid From:</b>	This field defaults to the date the license is created. This can be modified if you want to delay access and can be edited in the Update User screen.
<b>Valid To:</b>	This field defaults to a 5-year period. This can be changed if you want this user's privileges to expire earlier. It can also be extended, even beyond the valid time frame for the publication. This can be edited in the Update User screen.
<b>Active?:</b>	If you select "Yes", the user will appear as "Active" on your list of potential users and be available to be assigned to a product. If you select "No", the user will appear as "Inactive" on the list and will not be eligible to be assigned to a product. This can be edited in the Update User screen.

Update User
Delete

B) On the main ISS home page, under the “**Survey & Results**” header you will see your PCMH survey tools (each with a project ID listed under them). Select the Practice survey tool for which you need to provide additional documentation.

Your organization has licensed the following Web-based publications.

Please select one to use:

**PCMH**

- [2014 Patient-Centered Medical Home comp for ATurner1](#) (License 54513 )
- [2014 Patient-Centered Medical Home comp for ATurner1](#) (License 54514 )
- [2014 Patient-Centered Medical Home comp for ATurner1](#) (License 54515 )
- [2011 Patient-Centered Medical Home comp for ATurner1](#) (License 54499 )

**Administration**  
Click on the link below to enter the administrative area.

- [Administrative Functions](#)
- [Change User Password](#)

**Inactive Projects**  
Click on the Inactive Projects link listed below to view inactive projects.

- [Inactive Projects](#)

**Surveys & Results**  
We have conducted or are conducting the following surveys.

**PCMH**

- [2011:PCMH](#)
- [2014:PCMH](#)

**PCSP**

- [2013:PCSP](#)

**DO NOT** click here (license is displayed).

The tool will be located under the “Survey & Results” header.

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HOME

Please search to locate specific surveys or click the link to view all surveys.

Stage ID:

Org ID:

Project ID:

Project Name:

[Click here to view all projects](#)

NCQA  
Measuring quality  
Improving health care

HOME

We have conducted or are conducting the following surveys.

Please select one to view:

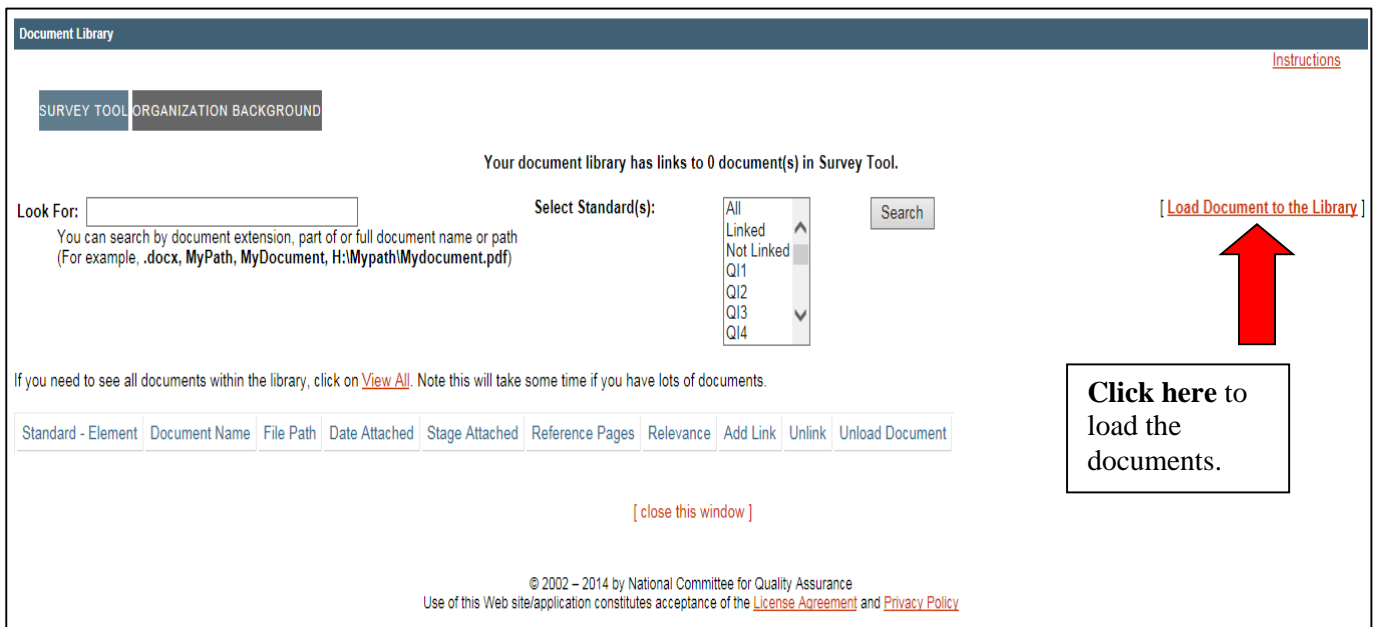
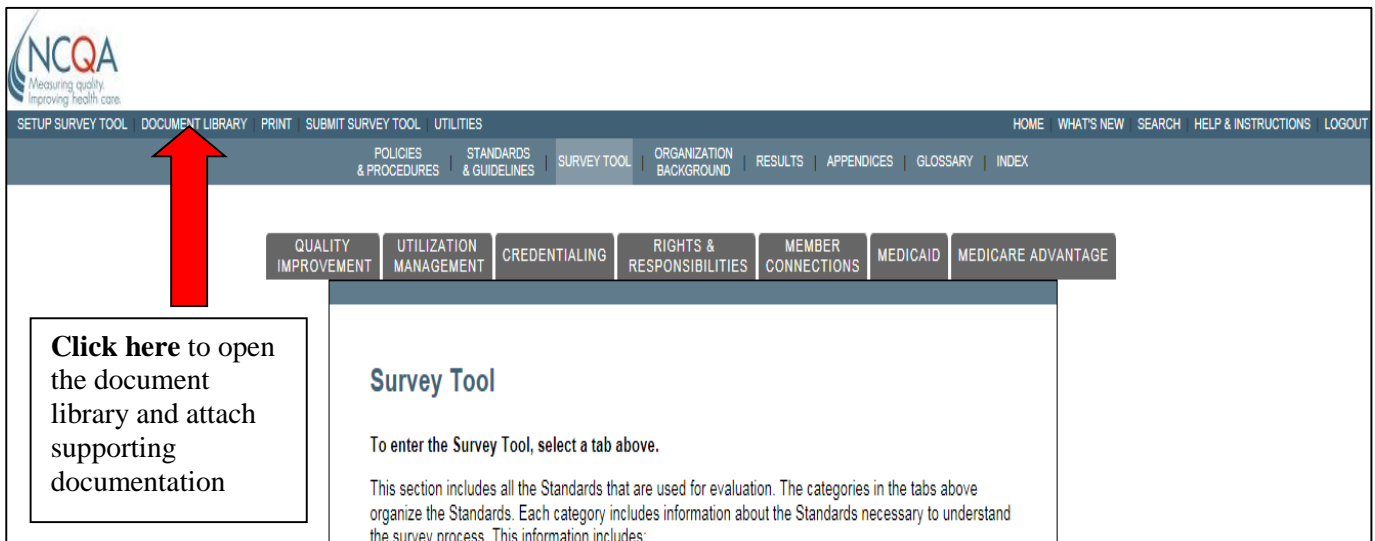
**2014: PCMH**

- [2014:PCMH Physician Group, LLC - Corporate - Corporate - Other - PCMH 2014](#) (Stage 5, Org 536366, Project 236366, Start 10/28/2014, Submitted 10/28/2014)

You may see this bar across the top of the screen:



- C) Select the **Project ID** link to load supporting documents specified on the OIF attach documents to the **“Document Library.”** Please do not attach supporting documentation under the **License Number** link or the **“Organization Background”** section.
- a) Use the **“Choose File”** button to launch a file **“look-in”** prompt of your local drives. When you locate the document, select it using the **“Open”** button on the file look-in prompt. Next select and copy the name of the document and paste it in to the **“Document Name”** field (not the entire file path).




D) Attach and link any additional documentation referenced on the OIF to the survey tool section of the document library.

[Instructions](#)

**New Document**

\* **Document Name:**

\* **Document File Path:**   

(Use the Browse button to locate the document)

**Document Name:**

**Document File Path:**

(Use the Browse button to locate the document)

**Document Name:**

**Document File Path:**

(Use the Browse button to locate the document)

**\*required**

[ close this window ]

Locate documents from your computer by browsing to find them.

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a) Link a document to the element or elements for which it serves as evidence.

[Instructions](#)

SURVEY TOOL ORGANIZATION BACKGROUND

Your document library has links to 1 document(s) in Survey Tool.

Look For:

You can search by document extension, part of or full document name or path  
(For example, .docx, MyPath, MyDocument, H:\MyPath\Mydocument.pdf)

Select Standard(s):

All  
 Linked  
 Not Linked  
 Q1  
 Q2  
 Q3  
 Q4

[\[ Load Document to the Library \]](#)

If you need to see all documents within the library, click on [View All](#). Note this will take some time if you have lots of documents.

Standard - Element ↑	Document Name ↑ <small>(Click to View)</small>	File Path ↑ <small>(Click to Edit)</small>	Date Attached ↑	Stage Attached ↑	Reference Pages	Relevance	Add Link	Unlink	Unload Document
Not Linked	<a href="#">PCMH 1 A</a>	<a href="#">PCMH 1 A Documentation.docx</a>	03/02/2015	0			<a href="#">Add Link</a>	<a href="#">Unlink</a>	<a href="#">Unload</a>

[ close this window ]

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Link documents to relevant elements.



- b) Complete the screen; be sure to add reference pages, pick a relevance level and select the element(s) to which the document should be linked. Be sure that you have loaded and linked all the documents you have referenced on the OIF.

Link Document to Element

[Instructions](#)

**Link to Element**

**Document Name:** PCMH 1 A

**Reference Pages:** 1-3

**Relevance Level:** Primary

**Document File Path:** PCMH 1 A Documentation.docx

**Please pick an element to link:** -Select an Element-

Save and Close    Save and Link More Elements    Cancel and Return to Document Library

[ close this window ]

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Make sure to select the element you are linking the document to and save.

- E) Send an e-mail to RP Manager who notified you of the issues stating that your practice comments response is complete.