# QIES USER MAINTENANCE APPLICATION USER'S GUIDE

Prepared for

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## INTRODUCTION

The Quality Improvement Evaluation System (QIES) User Maintenance application was created in response to an identified need for enhanced security in the QIES national systems that included individual, rather than facility-identified user IDs, and stricter password requirements.

With the QIES User Maintenance application (QUMA), QIES users set up their own user profiles and security information and can perform self-service account reset functions in the event of a forgotten password or an inactive account.

This user's guide provides information and instructions pertaining to the QIES User Maintenance application.

# ACCESSING THE SYSTEM

A link to the QIES User Maintenance application is readily accessible to QIES users at the following locations:

- QIES to Success web site (Figure 1)
- Welcome to the CMS QIES Systems for Providers page (Figure 2)

#### Figure 1. QIES to Success Web Site Home Page

8			QIES to Su	ccess
	Home	Suggestions	Help Desk	
ASPEN ASPEN Web Access Dashboards S&C PDQ QIES State Applications HHA Public Reports: Public OBQI MDS 2.0 Public Reports: MDS 3.0 Public Reports: MDS 4.0 Public R	QIES to Succ Welcome to QIES to assist in manag the Quality Improv quick and efficien need to find inforr and ASPEN, to na The purpose of Q supports CMS's n Medicare benefici QIES to Success and reports.	Suffrestions CESS - Overview to Success, the custom web-b ing and monitoring information rement Evaluation System. To 1 manner, visit the QIES to Succ nation on CASPER, MDS, OAS une a few. IES to Success is to provide an ission and initiatives to improve aries. provides easy access to numer	Help Desk ased system developed and applications within ind information in a ress pages anytime you IS, RAVEN, HAVEN, online system that a the quality of care for ous reporting systems	Context of the end of

# Figure 2. Welcome to the CMS QIES Systems for Providers Page (MDS Example)

CENTERS FOR MEDICARE & MEDICAID SERVICES
Welcome to the CMS QIES Systems for Providers
MDS and ePOC User Registration MDS 3.0 Submissions
MDS 3.0 Provider User's Guide Choose a Section Select
CASPER Reporting User's Guide for MDS Providers: Choose a Section
CASPER Reporting - Select this link to access the Final Validation and Provider reports.
OIES User Maintenance Application
QIES User Maintenance Application User's Guide
ASPEN Access (ePOC)

To access the QIES User Maintenance application:

**1** Select the link to the QIES User Maintenance Application from one of the pages listed above, the **QIES National System Login** page for QIES User Maintenance (Figure 3) is presented.

Figure 3. QIES User Maintenance Application Login Page

<b>QIES National System Login</b>	
Welcome to QIES User Maintenance	
Please enter your User ID and Password User ID: Password: Login	
Forgot your password or Inactive Account? QIES User Maintenance Application User's Guide	
Login with your user ID and password to: • change your password • reset an expired password • reactivate an account	
<ul> <li>If you cannot login with your user ID and password:         <ul> <li>click on the Forget your password or Inactive Account link to answer your security questions to allow you to access your user account.</li> </ul> </li> </ul>	

**NOTE**: Persons using the JAWS screen reader must start the JAWS application *prior* to accessing the QIES User Maintenance **Login** page in order to maintain password privacy.

The following shortcut keys are available for elements of the QIES User Maintenance **Login** page:

Alt + u	User ID field
Alt + w	Password field
Alt + g	Login button



Enter your user ID and password, and select the **Login** button.

The system responds with a pop-up box (Figure 4) informing you in how many days your password will expire.

#### Figure 4. Password Expiration Days Notice





Select the OK button.

The QIES User Maintenance **Password Update** page (Figure 5) is presented.

CMS		QIES U	ser	Maintenance	e
CENTERS for MEDICARE & MEDICAID SERVICES					Skip Navigation Links
	Password Update	User Profile	Help	Logout	
Password Update					
Your password will expire in 59 da	ys.				
To ensure the security of the password va	lue, the field will be popu	lated with dots.			
Current Password	:				
New Password	: [				
Re-enter Password	Update				
Password Rules:	[Show]				

#### Figure 5. QIES User Maintenance Password Update Page

**NOTE**: After 12 minutes with no interaction with the server, a pop-up dialog box warns you that your online session will timeout in 3 minutes and asks if you would like to extend it. Select the **OK** button to extend your session. After 15 minutes of inactivity you are logged out of QIES User Maintenance and must log in with your user ID and password in order to use the QIES User Maintenance application once again.

Every page of the QIES Maintenance application includes the following constants:

- The CMS logo and the title of the application, QIES User Maintenance, span the top
- A <u>Skip Navigation Links</u> link to the far-right, under the CMS logo and the application title

The <u>Skip Navigation Links</u> link allows users utilizing assistive readers to bypass the menu bar items, moving focus to the main body of the page.

The keyboard shortcut to quickly bring focus to the <u>Skip Navigation Links</u> link is Alt + n. Once in focus, press Enter to activate the link.

 The QIES User Maintenance menu bar – under the <u>Skip Navigation Links</u> link

The QIES User Maintenance menu bar provides access to the functionality of the QIES User Maintenance application.

### **MENU BAR**

The QIES User Maintenance menu bar includes the following items. The remainder of this guide describes the functionality of these items.

- Password Update
- User Profile
- Help
- Logout

The following shortcut keys bring focus to items on the QIES User Maintenance menu bar:

Alt + 1Password Update pageAlt + uUser Profile pageAlt + pHelp pageAlt + oLogout

With focus on one of these items, press the Enter key to access the page or activate the function.

**NOTE**: Shortcut keys utilizing numbers function only with the numeric keys along the top of the keyboard. They do not function with the numeric keys in the "10-key" pad of the keyboard.

## **USER PROFILE**

The QIES User Maintenance application allows you to establish and maintain a user profile that includes basic information about you, as well as a set of security questions for you to use in the event you forget your password or your account must to be reset due to lack of use.

**NOTE**: The first time you access the QIES User Maintenance application, you should complete your user profile.

To access the QIES User Maintenance **User Profile** page, select the *User Profile* item (Figure 6) from the menu bar.

CMS	QIES U	ser	Mainte	nance
CENTERS for MEDICARE & MEDICAID SERVICES				Skip Navigation Links
Password Update	User Profile	Help	Logout	
Password Update User: XXXXXXXXX				
Your password will expire in 59 days.				
To ensure the security of the password value, the field will be populated	lated with dots.			
Current Password:				
New Password:				
Re-enter Password:				
Update				
Password Rules: [Show]				

#### Figure 6. User Profile Menu Bar Item

The QIES User Maintenance User Profile page (Figure 7) is presented.

#### Figure 7. QIES User Profile Page

CMS		QIES U	lser	Maintenance	
CENTERS for MEDICARE & MEDICAID SERVICES					Skip Navigation Links
	Password Update	User Profile	Help	Logout	
User Profile User:					
User Information Security Que	stions				
First Name		×			
Last Name	( any				
Phone Number					
Email Address	And Statiger of				
Do Not Share Email					
	Save Reset				
Do not use the browser back button. To	make changes to the d	lata or navigate b	etween	pages, use the links provided	d in the application.
	3				

A user profile is maintained on two tabs of the **User Profile** page:

- User Information
- Security Questions

#### User Information Tab

When you access the **User Profile** page, the *User Information* tab (Figure 10) is presented by default. The *User Information* tab contains fields for the following user information. All fields are required.

- First name
- Last name
- Phone number
- E-mail address

**NOTE**: If you are a new user or a user who has not yet completed your user profile, the fields on the *User Information* tab are empty. If you previously provided your user profile information, that information is displayed in the fields on the *User Information* tab.

Please ensure that your e-mail address is correct. The self-service forgotten password/inactive account reset feature of the QIES User Maintenance application requires your current, valid e-mail address.

Additionally, for users associated with providers, the *User Information* tab provides a *Do Not Share Email* checkbox. Check this box if you prefer that your e-mail address is not shared with State agencies.

If you have not already completed your user profile, please provide the requested information and select the **Save** button.

The system responds with a pop-up box (Figure 8) indicating that your user information was successfully updated.

Figure 8. User Information Successful Update Notice



Select the **OK** button.

A message on the **User Profile** page (Figure 9) also confirms that your user information was successfully updated:

## Figure 9. User Information Update Confirmation Message

CMS		QIES U	ser	Maintenance	
CENTERS for MEDICARE & MEDICAID SERVICES					Skip Navigation Links
	Password Update	User Profile	Help	Logout	
User Profile User:					
Your user information has been succes	ssfully updated.				
User Information Security Que	stions				
First Name	: Martineau	×			
Last Name	:				
Phone Number					
Email Address	Real Pullinger of				
Do Not Share Email	: 🔽				
	Save Reset				
Do not use the browser back button. To	make changes to the d	ata or navigate b	etween p	pages, use the links provided	d in the application.

# Changing User Information

If, at any time you wish to change your user information, you may update one or more fields on the *User Information* tab of the **User Profile** page.

To modify your user information:

1.

Select the User Profile item on the QIES User Maintenance menu bar.

**2** Make changes to the appropriate fields on the User Information tab.

**NOTE:** If you make an error while editing your user information or wish to view the previously saved user information, you may select the **Reset** button to discard all new entries.



Select the Save button.

## Security Questions Tab

The QIES User Maintenance application includes a self-service feature that you may use in the event you forget your password or your account was inactivated due to lack of use. In addition to your e-mail address, this selfservice feature relies upon three security questions for which you pre-defined the answers.

These security questions are found on the *Security Questions* tab (Figure 10) of the **User Profile** page.

**NOTE**: If the *Security Question* tab is not completed, you cannot use the self-service feature of the system to reset your account and/or password yourself.

CENTERS for MEDICARE & MEDICAID SERVICES		QIES U	ser l	Maintenance	
· · · · · · · · · · · · · · · · · · ·					Skip Navigation Links
	Password Update	User Profile	Help	Logout	
User Profile User:					
User Information Security Ques	tions				
First Name:		×			
Last Name:	1. ang				
Phone Number:					
Email Address:	and the second				
Do Not Share Email:					
	Save Reset				
Do not use the browser back button. To r	make changes to the d	ata or navigate b	etween p	ages, use the links provided	d in the application.

#### Figure 10. Security Questions Tab

The first time you access the *Security Questions* tab (Figure 11), the fields are empty.

					Skip Navigation I
	Password Update	User Profile	Help	Logout	
er Profile					
Jser Information Security	Questions				
To ensure the security of the answ	ers to the security questions	the field will be no	nulated w	vith dots	
to ensure the security of the unsur	ers to the security questions,	the new win be por	pulated	nur dots.	
Question #1					
Question #1 What is the name of the street	where you grew up?			Edit	
Question #1 What is the name of the street	where you grew up?			Edit	
Question #1 What is the name of the street Re-enter Answer:	where you grew up?			Edit	
Question #1 What is the name of the street Re-enter Answer: Question #2	where you grew up?			Edit	
Question #1 What is the name of the street Re-enter Answer: Question #2 What is the name of the first sc	where you grew up?			Edit Edit	
Question #1 What is the name of the street Re-enter Answer: Question #2 What is the name of the first sc Re-enter Answer:	where you grew up?			Edit Edit	
Question #1 What is the name of the street Re-enter Answer: Question #2 What is the name of the first sc Re-enter Answer: Question #3	where you grew up? hool you attended?			Edit Edit	
Question #1 What is the name of the street Re-enter Answer: Question #2 What is the name of the first sc Re-enter Answer: Question #3 In what city/town did your mother	where you grew up? hool you attended? er and father meet?			Edit Edit Edit	

Figure 11. User Profile Page – Security Questions Tab

To establish answers to the security questions:

**1** Enter and re-enter your response for each of the three (3) security questions.

**NOTE:** Answers to the questions must be three (3) or more characters in length. You can use letters, numbers, special characters, and spaces. The values are not case-sensitive.

**NOTE**: For security purposes, your answers to the security questions are masked with a solid black circle. Because you cannot visually review your answers, "Re-enter" fields are provided for each. The system verifies that your answer to each security question matches the answer you entered into the associated "Re-enter" field.

# 2. Select the Save button.

The system responds with a pop-up box (Figure 12) indicating that your security question answers were successfully saved.

# Figure 12. Security Question Answers Successful Save Notice





Select the OK button.

A message on the **User Profile** page (Figure 13) also confirms that your security question answers were successfully saved.

# Figure 13. Security Question Answers Saved Confirmation Message

kip Navigation I

# **Changing Security Question Responses**

If, at any time, you wish to modify one or more answers to your security questions:

Access the Security Questions tab (Figure 14) of the **User Profile** page.

Figure 14. User Profile – Security Questions Tab

			Skip Navigation
Password Update Use	r Profile He	lp Logout	
er Profile			
Iser Information Security Questions			
To ensure the security of the answers to the security questions, the fie	ld will be populate	ed with dots.	
To ensure the security of the answers to the security questions, the fie Question #1	ld will be populate	ed with dots.	
To ensure the security of the answers to the security questions, the fie Question #1 What is the name of the street where you grew up?	ld will be populate	ed with dots.	
To ensure the security of the answers to the security questions, the fie Question #1 What is the name of the street where you grew up?	ld will be populate	ed with dots.	
To ensure the security of the answers to the security questions, the fie Question #1 What is the name of the street where you grew up? Question #2	ld will be populate	ed with dots.	
To ensure the security of the answers to the security questions, the fie Question #1 What is the name of the street where you grew up? Question #2 What is the name of the first school you attended?	ld will be populate	Edit Edit Edit	
To ensure the security of the answers to the security questions, the fie Question #1 What is the name of the street where you grew up? Question #2 What is the name of the first school you attended? •	ld will be populate	Edit	
To ensure the security of the answers to the security questions, the fie Question #1 What is the name of the street where you grew up? Question #2 What is the name of the first school you attended? Question #3	ld will be populate	ed with dots.	
To ensure the security of the answers to the security questions, the fie Question #1 What is the name of the street where you grew up? Question #2 What is the name of the first school you attended? Question #3 In what city/town did your mother and father meet?	ld will be populate	ed with dots.	

2. Select the *Edit* checkbox(es) (Figure 12) associated with the question(s) you wish to change.

/			Skip Navigation L
Password Upda	e User Profile	Help Logout	
er Profile			
r: XXXXXXXXX			
Least Information Convits Outputiens			
User Information Security Questions			
User mormation Security Questions			
Fo ensure the security of the answers to the security questions	ons, the field will be pop	ulated with dots.	
To ensure the security of the answers to the security questions	ons, the field will be pop	ulated with dots.	
To ensure the security of the answers to the security questions Question #1 What is the name of the street where you grew up?	ons, the field will be pop	Edit	
To ensure the security of the answers to the security questions Question #1 What is the name of the street where you grew up?	ons, the field will be pop	Edit	
To ensure the security of the answers to the security question Question #1 What is the name of the street where you grew up?	ons, the field will be pop	Edit	
To ensure the security of the answers to the security question Question #1 What is the name of the street where you grew up? Question #2 What is the name of the first school you attended?	ons, the field will be pop	Edit	
To ensure the security of the answers to the security questions Question #1 What is the name of the street where you grew up? Question #2 What is the name of the first school you attended?	ons, the field will be pop	Edit	
To ensure the security of the answers to the security question Question #1 What is the name of the street where you grew up? Question #2 What is the name of the first school you attended? Question #3	ons, the field will be pop	Edit Edit Edit Edit	
To ensure the security of the answers to the security questions Question #1 What is the name of the street where you grew up? Question #2 What is the name of the first school you attended? Question #3 In what city/town did your mother and father meet?	ons, the field will be pop	Edit Edit Edit Edit	

For each question you selected the *Edit* checkbox, the system clears the answer field and provides a *Re-enter Answer* field (Figure 16).

Figure 16. Security	Question A	Answer Ready to	Edit
---------------------	------------	-----------------	------

Password Update	User Profile	Help	Logout	Skip Navigation L
er Profile In: HHA0000262 User Information Security Questions				
To ensure the security of the answers to the security questions,	, the field will be pop	oulated w	ith dots.	
Question #1 What is the name of the street where you grew up? Re-enter Answer:			Edit IZ	
Question #1 What is the name of the street where you grew up? Re-enter Answer: Question #2 What is the name of the first school you attended? •			Edit IZ Edit	

**3.** For each question you selected to edit, enter your new response to the question and re-enter the same response in the *Re-enter Answer* field.

**NOTE:** If you make an error while editing a response, you may select the **Reset** button to discard all new entries.

Select the **Save** button to save your changes.

The system responds with a pop-up box (Figure 17) indicating that your security question answers were successfully saved.

#### Figure 17. Security Question Answers Successful Save Notice



5.

Select the **OK** button.

A message on the **User Profile** page also confirms that your security question answers were successfully saved.

## PASSWORDS

The following rules govern the use of passwords that access QIES systems:

- QIES passwords are assigned to individuals and must not be shared.
- A password for QIES National application is valid only for 60 days. After 60 days, your password expires and the next time you attempt to log in to a QIES system, you must change your password before access is granted.
- If you do not log in with a valid password to a QIES system for 90 days, the status of your user account is changed to *Inactive* and subsequent attempts to access a QIES system is denied.

The QIES User Maintenance application includes a self-service feature that you may use in the event you forget your password or you need to reactivate an inactive account. This self-service feature relies upon your e-mail address and three security questions for which you pre-defined the answers.

## Forgotten Password or Inactive Account

You can use the QIES User Maintenance application to:

- Reset a forgotten password.
- Reactivate an inactive account.

To reset your password or reactive your inactive account:

1 On the **QIES National System Login** page for QIES User Maintenance, select the <u>Forgot your password or Inactive Account?</u> link (Figure 18).

<b>QIES National System Login</b>	
Welcome to QIES User Maintenance         Please enter your User ID and Password         User ID:         Password:         Login	
 Forgot your password or Inactive Account?     QIES User Maintenance Application User's Guide	
Login with your user ID and password to: • change your password • reset an expired password • reactivate an account	
<ul> <li>If you cannot login with your user ID and password:</li> <li>click on the Forget your password or lnactive Account link to answer your security questions to allow you to access your user account.</li> </ul>	

#### Figure 18. Forgotten Password/Inactive Account Link

The system requests your user ID (Figure 19) and challenges you with three security questions to answer.

**Figure 19. Security Questions** 

CENTERS for MEDIC	QIES User Maintenance Login
	To ensure the security of the answers to the security questions, the field will be populated with dots.
	Enter Your User ID: What is the name of the street where you grew up?
	What is the name of the first school you attended?
	Login

2. Enter your user ID and responses to all three security questions and select the Login button.

**NOTE**: You are allowed three attempts to enter the correct responses to the security questions associated with the user ID you specified. If you do not answer correctly, the security questions are locked. Contact the QTSO Help Desk at 1-800-339-9313 for assistance with your account.

If you answer all of the security questions correctly, the system displays a message (Figure 20) indicating that an activation key has been sent to the e-mail address associated with your account. The page now includes an *Enter The Activation Key* field.

#### Figure 20. Activation Key Response

QIES User Maintenance Login	
An e-mail with the activation key has been sent to the e-mail address associated with your account. To ensure the security of the answers to the security questions, the field will be populated with dots.	
Enter The Activation Key: What is the name of the street where you grew up?	
What is the name of the first school you attended? In what city/town did your mother and father meet?	

**3.** Access your e-mail account and open the e-mail message (Figure 21) from <u>info@qtso.com</u>.

#### Figure 21. Activation Key E-mail



- **4** Highlight and copy [Ctrl + c] the Activation Key. When you copy the Activation Key, ensure that you do not include any blank spaces following the last character of the key.
- 5. Return to the QIES User Maintenance Login page and paste [Ctrl + v] the Activation Key into the Enter The Activation Key field. Re-enter your user ID and responses to the three security questions in the appropriate fields and select the Login button.

The system responds with a pop-up box (Figure 22) informing you in how many days your current password will expire.

Figure 22. Password Expiration Days Pop-Up Notice

<u>.</u>	Your password will expire in 39 days.
	ОК

**6** Select the **OK** button.

The **Password Update** page (Figure 23) is presented.

#### Figure 23. Password Update Page

5.					
e, the field will be popu	lated with dots.				
Update					
	e, the field will be popu	e, the field will be populated with dots.	e, the field will be populated with dots.	e, the field will be populated with dots.	e, the field will be populated with dots.

**7** Enter and re-enter your new password.

**NOTE:** Select the <u>Show</u> link to display a complete list of password rules.

# 8 Select the Update button.

The system responds with a pop-up box (Figure 24) indicating that your password was successfully updated.

#### Figure 24. Password Successful Update Notice

1	Your password has been successfully updated.
	ОК



Select the OK button.

A message on the **Password Update** page (Figure 254) also confirms that your password was successfully updated.

#### Figure 25. Password Update Confirmation Message

СМ	5/	QIES U	lser	Maintenar	nce
CENTERS for MEDICARE & MEDICAID SERVICES	Password Update	User Profile	Help	Logout	Skip Navigation Links
Password Update					
Your password has been su	ccessfully updated.				

### Update Expired Password

Passwords to QIES national applications expire every 60 days. When you attempt to log in to a QIES national application with an expired password, the system redirects you to the QIES User Maintenance **Password Update** page (Figure 26) and displays the message "Your password has expired. Please change it now."

#### Figure 26. Password Update Page – Your Password Has Expired

ENTERS for MEDICARE & MEDICAID SERV	ICES		i mainte	
	Password Update	User Profile He	lp Logout	SKIP Navigation Links
Password Update Jser: xxxxxxxxx Your password has expin	ed. Please change i	it now.	22	
To ensure the security of the p	assword value, the field	will be populated with do	its.	
Current Passw New Passw	ord: ord:			

**NOTE**: If you have not previously established answers to the QIES User Maintenance application security questions, you are redirected to the *Security Questions* tab of the **User Profile** page when you attempt to log in to a QIES national system with an expired password. To proceed, provide your responses to those questions. Refer to the *Security Questions* section of this guide for more information.

To change your password:

- Enter the following on the **Password Update** page:
  - Your current password in the Current Password field
  - A new password in the New Password field
  - The same new password in the *Re-Enter Password* field.

**NOTE:** Select the <u>Show</u> link to display a complete list of password rules.

# 2. Select the **Update** button.

The system responds with a pop-up box (Figure 27) indicating that your password was successfully updated.

## Figure 27. Password Successful Update Notice





A message on the **Password Update** page (Figure 28) also confirms that your password was successfully updated. A link to the original application into which you were attempting to log in is provided.

Figure 28. Password Update Confirmation Message with Return Link

СМЯ	4	QIES U	lser	Maintena	ince
CENTERS for MEDICARE & MEDICAID SERVICES					Skip Navigation Links
	Password Update	User Profile	Help	Logout	
Your password has been suce	cessfully updated.				
To continue the login process, click o	n this link:				



Select the link to return to the application.

You are successfully logged in to the original QIES national application you were attempting to access.

### Change Password

You can use the QIES User Maintenance application to change your password at any time.

To change your password:

**1** Log in to the QIES User Maintenance application (Refer to the Accessing the System section of this guide).

The QIES User Maintenance **Password Update** page (Figure 29) is presented upon completion of a successful login.

Figure 29. QIES User Maintenance Password Update Page

CMS		QIES U	ser	Maintenanc	e
CENTERS for MEDICARE & MEDICAID SERVICES	-				Skip Navigation Links
2	Password Update	User Profile	Help	Logout	
Password Update User: XXXXXXXXX					
Your password will expire in 59 da	ays.				
To ensure the security of the password va	lue, the field will be popul	lated with dots.			
Current Password	E				
New Password	l:				
Re-enter Password	Update				
Password Rules:	[Show]				

- 2. Enter your current password in the *Current Password* field.
- **3** Enter a new password in the *New Password* field.
- **4** Enter the same new password in the *Re-enter Password* field.

**NOTE:** Select the <u>Show</u> link to display a complete list of password rules.

# 5. Select the Update button.

The system responds with a pop-up box (Figure 30) indicating that your password was successfully updated.

Figure	30. I	Password	Successful	Update	Notice
<u> </u>					

⚠	Your password has been successfully updated.
	OK

# 6 Select the OK button.

A message on the **Password Update** page also confirms that your password was successfully updated.

**NOTE:** You are allowed to update your password once each day.

## HELP

Select the *Help* item on the QIES User Maintenance menu bar to access the Help options that are available to you. The system presents links for the following:

- Accessibility Policy
- Contact Us
- Privacy Policy

# LOGOUT

To log out of the QIES User Maintenance application, select the *Logout* item on the menu bar.