
Center for Clinical Standards and Quality

Ref: QSO-26-12-NH **REVISED**

DATE: **September 11**, 2026

TO: State Survey Agency Directors

FROM: Directors, Quality, Safety & Oversight Group (QSOG) and Survey & Operations Group (SOG)

SUBJECT: **REVISED** Payroll Based Journal (PBJ) Transition to iQIES

Memo Info:

Memo Revision Date: 2026-09-11

Original Release Date: 2026-07-14

Memorandum Summary

- The Payroll-Based Journal (PBJ) system will transition into the Internet Quality Improvement & Evaluation System (iQIES) on August 17, 2026.
- Beginning August 17, 2026, all PBJ staffing data must be submitted through iQIES. Reporting requirements and quarterly deadlines will not change.
- Providers and vendors must act now to ensure access to iQIES before the transition date.
- Beginning August 17, 2026, users will be allowed to access and run PBJ reports in iQIES
- **Updated PBJ Policy Manual and PBJ Policy FAQ have been posted to reflect the iQIES transition of PBJ.**

Background:

Staffing in long-term care nursing facilities significantly affects the care delivered to residents. Since July 2016, nursing homes have been submitting data electronically through the PBJ system, as required under section 1128I(g) of the Social Security Act (the Act) and 42 CFR §483.70(q). The data submitted by facilities reflect the number of hours direct care staff are paid to work each day. All data submitted is auditable back to payroll and other verifiable sources. In April 2018, CMS began using PBJ data to calculate staffing levels and star ratings on the Nursing Home Compare website and in the Five Star Quality Rating System.

Discussion:

CMS is excited to share that the **Payroll-Based Journal (PBJ) system** will move into **iQIES** on **August 17, 2026**. iQIES is a secure, cloud-based system that CMS uses to collect and manage quality and compliance information. Transitioning PBJ into iQIES is part of ongoing work to modernize systems and improve security. **Starting August 17, 2026, you must submit all PBJ staffing data in iQIES.** Your reporting requirements and quarterly deadlines will not change.

What You Need to Do Before Launch to Get Access to iQIES

To ensure you can submit PBJ staffing data in iQIES beginning August 17, 2026, all providers and vendors must:

1. **Create an HCQIS Access Roles and Profile System (HARP) account** - *Skip this step if you already have a [HARP](#) account. If you do not have an account, [register here](#).*
2. **Request access to [iQIES](#)** - Submit your request early so your access is ready before launch. Although you may request your PBJ role before August 17 (and CMS strongly recommends you do so), *PBJ functionality will not be available for use in iQIES until August 17, 2026.*
3. **Choose the correct PBJ role** - Role descriptions are listed below.
 - **PSO:** Can view, upload, edit PBJ data and run PBJ reports. This role also approves user access.
 - **PBJ Submitter (Provider or Vendor):** Can view, upload, edit PBJ data and run PBJ reports.
 - **Provider Administrator:** View-only access and run PBJ reports.
 - **PBJ Viewer:** View-only access and run PBJ reports.
 - Additional information on roles can be found in the iQIES Onboarding Process - Provider User Roles Manual posted on the [iQIES Reference and Manuals](#) on QTSO under iQIES Onboarding Guides.
4. **Get approval from your facility's Provider Security Official (PSO)** - Your access will not become active until they approve it. Each facility must have at least one PSO to manage access for additional users.
 - Once you register for an iQIES account, be sure to log in regularly. If you do not log in for 60 days, you'll lose access to iQIES. Additional information on the [iQIES Inactive User Policy](#) can be found on QTSO.

Vendors must request access for each facility they represent and get approval from a PSO at each facility, using the facility's CMS Certification Number (CCN).

Visit the [Staffing Data Submission PBJ website](#) for additional information, helpful tools and links. Review additional policy information in the [PBJ Policy Manual](#) and [Nursing Home Five-Star Quality Rating System User Guide](#). *An updated PBJ Policy Manual and PBJ Policy FAQ sheet have been posted to reflect the iQIES transition of PBJ.*

Key Benefits of the New iQIES PBJ System

- You can securely access iQIES **anytime, anywhere** within the US, with internet.
- You only need to **log in once**; no more using CMSNet and separate systems.
- iQIES includes **tips and guidance** to help you upload PBJ files and access reports.
- You can upload PBJ files in a way that's **very similar to QIES**, so the process should feel familiar.

What Providers and Vendors Should Expect

- PBJ submissions for **Fiscal Quarter 3** must be submitted in **QIES only through August 14, 2026**.
- After **August 14, 2026, at 11:59 PM ET**, QIES will **no longer accept** PBJ records.
- PBJ submissions for **Fiscal Quarter 4** start **August 17, 2026**, and must be submitted **only in iQIES**.
- **Fiscal Quarter 4** submissions will not be accepted between **July 1, 2026 and August 16, 2026**, in **QIES or iQIES**.

QIES / iQIES Report Information

Beginning August 17, 2026, users will be allowed to access and run PBJ reports in iQIES. Once the migration into iQIES has occurred, the PBJ reports in the Certification and Survey Provider Enhanced Reporting (CASPER) Reporting application will be decommissioned with two exceptions: users will be allowed to access QIES for the system-generated final validation reports for submissions performed in QIES, as well as the user-requested PBJ Submitter Final Validation Report, both for limited periods of time.

Below is a list of reports that will be available in iQIES, including the names of the CASPER and iQIES reports for comparison, as well as any differences to which users should be aware.

1. CASPER Report Name: **1700D EMPLOYEE REPORT**
 - a. iQIES Report Name: **PBJ Employee Report**
 - b. iQIES Report Category/Report Type: Payroll-Based Journal/Staffing
 - c. Differences from CASPER report: The use of the term Contractor was replaced with Contract throughout the report to match PBJ Specifications.
2. CASPER Report Name: **1702D INDIVIDUAL DAILY STAFFING REPORT**
 - a. iQIES Report Name: **PBJ Individual Daily Staffing Report**
 - b. iQIES Report Category/Report Type: Payroll-Based Journal/Staffing
 - c. Differences from CASPER report: The 'Only Include Data Accepted Prior to the Deadline' filter on the report criteria page is no longer applicable and will not be available in the iQIES report.
3. CASPER Report Name: **1702S STAFFING SUMMARY REPORT**
 - a. iQIES Report Name: **PBJ Staffing Summary Report**
 - b. iQIES Report Category/Report Type: Payroll-Based Journal/Staffing
 - c. Differences from CASPER report: The use of the term Contractor was replaced with Contract throughout the report to match PBJ Specifications.
4. CASPER Report Name: **1703D JOB TITLE REPORT**
 - a. iQIES Report Name: **PBJ Job Title Report**
 - b. iQIES Report Category/Report Type: Payroll-Based Journal/Staffing
 - c. Differences from CASPER report: The 'Only Include Data Accepted Prior to the Deadline' filter on the report criteria page is no longer applicable and will not be available in the iQIES report. The use of the term Contractor was replaced with Contract throughout the report to match PBJ Specifications.
5. CASPER Report Name: **1705D PBJ STAFFING DATA REPORT**
 - a. iQIES Report Name: **PBJ Staffing Data Report**
 - b. iQIES Report Category/Report Type: Payroll-Based Journal/Staffing
 - c. Differences from CASPER report: None
6. CASPER Report Name: **PBJ ON DEMAND FINAL FILE VALIDATION REPORT**
 - a. iQIES Report Name: **PBJ On Demand Final File Validation Report**
 - b. iQIES Report Category/Report Type: Payroll-Based Journal/Validation

- c. Differences from CASPER report: The 60-day waiting period for requesting the on-demand PBJ Final Validation Reports has been removed to account for new access in iQIES and the QIES system-generated Final Validation Reports being unavailable in the iQIES PBJ Final Validation folders.
7. CASPER Report Name: **PBJ SUBMITTER FINAL FILE VALIDATION REPORT**
 - a. iQIES Report Name: **PBJ Submitter Final File Validation Report**
 - b. iQIES Report Category/Report Type: Payroll-Based Journal/Validation
 - c. Differences from CASPER report: Because the submitter user IDs differ between QIES and iQIES, users will not be allowed to run the iQIES report for submissions performed in QIES. As such, users will be allowed to run this report in CASPER for three months following the PBJ migration and then it will be made permanently unavailable.
8. CASPER Report Name: **PBJ System-generated Final Validation Report**
 - a. iQIES Report Name: **PBJ System Generated Final File Validation Report**
 - b. iQIES Report Category/Report Type: Not applicable
 - c. Differences from CASPER report: The system-generated Final Validation Reports in QIES will not be migrated into iQIES; however, users will be allowed to access CASPER to obtain these until they are automatically deleted based upon the report retention time period, if desired. Alternatively, users can generate the iQIES user-requested final validation reports for submissions performed in QIES if it is more convenient.

The iQIES report now includes a CMS Certification Number (CCN) and error sections such as General, Staffing, Employee, or Employee Link have been delineated to make the report more intuitive for users.

Here is some important information about the iQIES reports:

- Users' access to the iQIES reports will be like the access in the Certification and Survey Provider Enhanced Reporting (CASPER) Reporting application, provided that your new iQIES role allows you to generate and view reports.
- Users will only be allowed to run reports for the providers to which they have access with their iQIES role.
- The iQIES reports will contain the same information as the CASPER reports but have been updated to have the iQIES standard appearance.
- Ten years' worth of PBJ data will be migrated into iQIES which will allow users to run all reports except the Submitter Final Validation report for data submitted in QIES and iQIES, if desired.
- In iQIES, users can initially view the report information on the screen and if desired, download the report to a Portable Document Format (PDF) or Comma-Separated Values (CSV) file. The exception is the PBJ Job Title Report, which can only be downloaded as a CSV file, as was the case in CASPER.
- The iQIES Submission IDs will have a different sequencing number. Here are some tips when reviewing reports where QIES and iQIES submission IDs display in the same report:
 - Submission files in QIES will have a submission ID of less than 100,000,000
 - Submission files in iQIES will have a submission ID of 100,000,000 or greater
- Users can schedule reports to run at their desired interval and frequency.

For assistance with accessing, running, or downloading the PBJ reports, please refer to the CMS iQIES Reports User Manual which is available in the Help section of the iQIES application, as well as on the QIES Technical Support Office (QTSO) website in the iQIES Reports Training Manual section: <https://qtso.cms.gov/software/iques/reference-manuals>

Training and Support

- Training materials, user guides, and technical documents will be posted on the QTSO website before the launch.

Visit the [Staffing Data Submission PBJ website](#) for additional information, helpful tools and links. Review additional policy information in the [PBJ Policy Manual](#) and [Nursing Home Five-Star Quality Rating System User Guide](#).

Contact:

Policy Questions: Email: nhstaffing@cms.hhs.gov

Technical Questions: Contact the iQIES Service Center at (800) 339-9313, Monday through Friday, 8:00 AM-8:00 PM EST, by e-mail at: iques@cms.hhs.gov or by going to CCSQ Support Central at [CCSQ Support Central](#) to open a Web Ticket or Chat with a live agent using CARL. Please note that Chat support is currently limited to 9:00 AM-5:00 PM ET, Monday through Friday.

Effective Date:

Immediately. Please communicate to all appropriate staff within 30 days.

/s/

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Group

Resources to Improve Quality of Care:

Check out CMS's new Quality in Focus interactive video series. The series of 10–15 minute videos are tailored to provider types and aim to reduce the deficiencies most commonly cited during the CMS survey process, like infection control and accident prevention. Reducing these common deficiencies increases the quality of care for people with Medicare and Medicaid.

Learn to:

- Understand surveyor evaluation criteria
- Recognize deficiencies
- Incorporate solutions into your facility's standards of care

See the [Quality, Safety, & Education Portal Training Catalog](#), and select Quality in Focus

Receive email notification for memos:

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