



iQIES S&C Onboarding Process

Job Aid

State Agency General User (SAGU) Role

Overview

This new user onboarding job aid addresses how to request a SAGU role in iQIES.

For detailed information on how to use iQIES, refer to [Reference & Manuals](#) on QTSO (QIES Technical Support Office).

There are separate onboarding guides for Security Officials and State Agency Assessment Coordinators. Refer to [Reference & Manuals](#) on QTSO.

Roles and Permissions

iQIES roles allow users to access information pertinent to their area of work.

Permissions are ultimately governed by HARP (Health Care Quality Information Systems (HCQIS) Access Roles and Profile) access privileges. Contact the SO for your organization or the iQIES Service Center for issues relating to access and permissions. Refer to the [iQIES User Roles Matrix](#) for detailed information on specific State Agency user roles.

For additional help, see [iQIES Service Center information](#) below or click the help icon in the top right corner of the screen, see *Figure 1, Help Icon*, for further information.



Figure 1: Help Icon

1. Log in to iQIES

1.1 Go to <https://iqies.cms.gov/>.

1.2 Type HARP User ID and password. See *Figure 2, iQIES Log In Page*.

Note: Go to [HARP Help Page](#) for detailed instructions on how to log into HARP or review the [HARP video](#).

The screenshot shows the iQIES login page. At the top left is the iQIES logo. At the top right is a red circle with the number 5 and a question mark icon. Below the logo, on the left, is the text 'Welcome to iQIES' followed by 'Essential accessibility and connectivity for health care professionals.' On the right, there is a yellow 'Log In' button. Below it, a note says 'All required fields are marked with an asterisk (*)'. There are two input fields: 'User ID *' (callout 1) and 'Password *' (callout 2). Below these is a checkbox (callout 3) with the text 'I have read the full privacy and security notice below and consent to its terms and conditions regarding usage and information collection.' Below the checkbox is a blue 'Log In' button (callout 4) and a link 'Forgot your user ID or password?'. At the bottom, there is a paragraph of privacy and security notices with a link 'Read full notice'.

Figure 2: iQIES Log In Page

Table 1: iQIES Log In Page Callout Details

Callout	Detailed Explanation
1	Type HARP user ID.
2	Type HARP password.
3	Check privacy and security notice. Notice details are at the bottom of the page.
4	Click Log In to log into iQIES.
5	Click the question mark (?) to get to the iQIES Help page, which has detailed help information.

- 1.3 Click privacy and security check box.
- 1.4 Click **Log In**. The **Two-Factor Authentication** window opens. See *Figure 3, Two-Factor Authentication*.

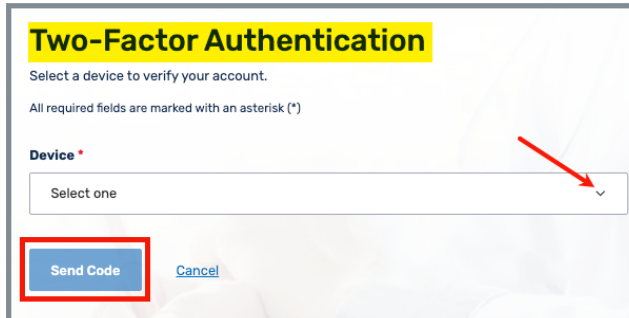
The image shows a web form titled "Two-Factor Authentication" in a yellow header. Below the title, it says "Select a device to verify your account." and "All required fields are marked with an asterisk (*)". There is a label "Device *" above a dropdown menu that currently shows "Select one". A red arrow points to the downward-pointing caret on the right side of the dropdown menu. Below the dropdown, there is a blue button labeled "Send Code" which is highlighted with a red rectangular box, and a blue link labeled "Cancel".

Figure 3: Two-Factor Authentication

- 1.5 Click the caret under **Device** to select the device from the drop-down menu.
Note: Two-factor authentication is set up in HARP. Go to [HARP FAQs](#) to learn how to update, if desired, the device to verify account.
- 1.6 Click **Send Code**. The code is sent to the requested device. The **Enter Code** window opens. See *Figure 4, Enter Code Window*.

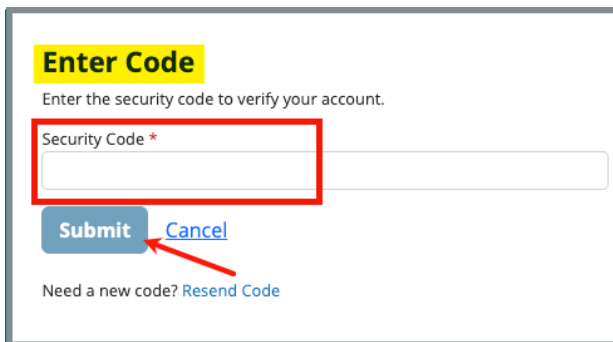
The image shows a web form titled "Enter Code" in a yellow header. Below the title, it says "Enter the security code to verify your account." There is a label "Security Code *" above a text input field. A red rectangular box highlights the input field. Below the input field, there is a blue button labeled "Submit" and a blue link labeled "Cancel". A red arrow points to the "Submit" button. At the bottom, it says "Need a new code? [Resend Code](#)".

Figure 4: Enter Code Window

- 1.7 Type the code received in the field under **Security Code**.
Note: **Submit** is greyed out until correct security code is typed.
- 1.8 Click **Submit**. The **Welcome to iQIES/Request User Role** page opens.
Note: The **Welcome to iQIES/Request User Role** page only opens the first time iQIES is opened. Once a role has been approved, iQIES opens to either the user role dashboard, or the appropriate role landing page.

2. Request a User Role in iQIES

Notes:

- All users start with the **State Agency S&C General User** role, which has read-only access. Once the basic role has been approved by the Security Official (SO), it is possible to add additional roles.
- SO user role job aids can be found on [QTSO](#).

2.1 Click **Request User Role**. See *Figure 5, Request a User Role*. The **Select a User Category** page opens.

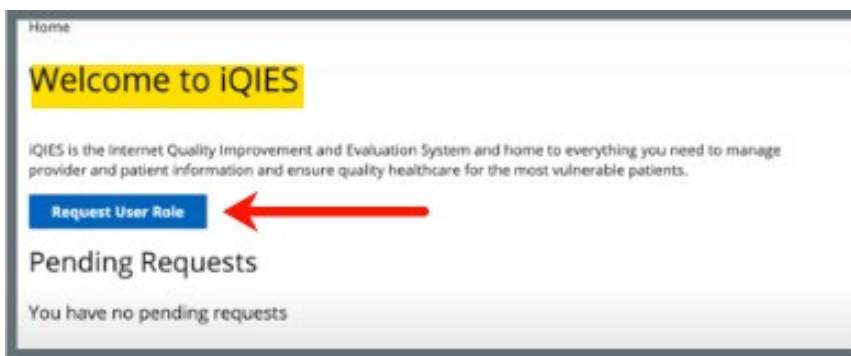


Figure 5: Request a User Role

Note: The **Welcome to iQIES** page does not open when there is an existing user role. To request a user role when there is an existing user role, follow the bulleted steps below. See *Figure 6, Request User Role From Top Menu*.

- Click the user icon in the top right corner of iQIES. A drop-down menu opens.
- Click **Request User Role**. The **Select a User Category** page opens. Follow the next steps.

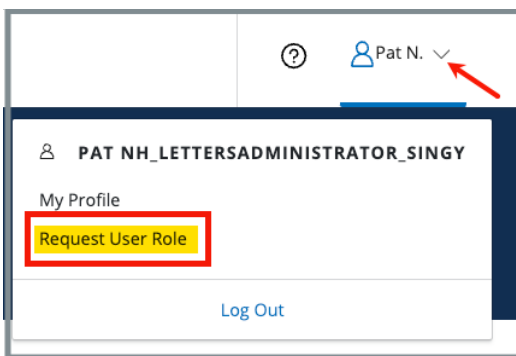


Figure 6: Request User Role From Top Menu

STEP 1

Select a User Category

Select the category of your organization to begin the role request process.

- ☐ **Accrediting Organization**
Administration and survey of deemed healthcare providers.
- ☐ **CMS**
iQIES Administration for User Security Support for Patient Assessments and or Survey and Certification.
- ☐ **Contractor**
CMS Contractors, Contract Surveyors, Medicare Administrative Contractors, Medicare Administrative Contractor Security Official
- ☐ **Provider**
Healthcare organizations, agencies, and services.
- ☐ **QIO/QIN**
QIO/QIN-level administration for provider Quality Measure support activities
- ☒ **State Agency**
State-level administration for Survey and Certification activities and Patient Assessments Management activities.
- ☐ **Vendor**
Data and assessment submitters on behalf of providers.

Figure 7: Select a User Category

- 2.2 Select **State Agency**. See *Figure 7, Select a User Category*.
- 2.3 Click **Next**. The **Select a User Role** page opens. See *Figure 8, Select a User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- ☐ **State Agency Assessment Coordinator**
Manage ICD-10 exclusions and patient assessment information, view and manage patient profiles and assessments, run provider reports.
- ☐ **State Agency Security Official for S&C**
iQIES user access approvals and user profiles.
- ☒ **State Agency S&C General User**
This role will have the most basic access to iQIES, which would be Read Only access to the provider information. This role will be granted extra authority based on your job requirements by the State Agency Security Official.
- ☐ **MDS Extract Data API Access**
Access MDS Extract Data API

Next [Previous](#)

Figure 8: Select a User Role

- 2.4 Select a State Agency user role.
- 2.5 Click **Next**. The **Add Organizations** window opens. See *Figure 9, Add Organizations*.

Note: **Next** is greyed out until a user role is selected.

STEP 3

Add Organizations

Enter the state for your organization.

State *

Florida

State Agency Employee ID

Forgot your ID? [?](#)

Are you a Surveyor?

☐ Yes

☐ No

Submit Request Previous

Figure 9: Add Organizations

2.6 Select a state from the drop-down menu under **State**.

Notes:

- A separate request is needed when a State Agency has more than one state.
- **State Agency Employee ID** and **Are you a Surveyor** are optional responses. A response in those fields opens further fields.

2.7 Click **Submit Request**. The **My Profile** page opens.

Note: **Submit Request** is greyed out until a state is selected.

2.8 Verify the **Role Request Submitted** green notification bar appears on the top of the page. See *Figure 10, Role Request Submitted Notification*.

Welcome to iQIES

✓

Role Request Submitted

Your approval status will be emailed to you after your request is reviewed.

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iQIES is the Internet Quality Improvement and Evaluation System and home to everything you need to manage provider and patient information and ensure quality healthcare for the most vulnerable patients.

Request User Role

Pending Requests

State Agency

User Role	State Agency	Management Unit	Work Unit
State Agency S&C General User	Florida	No information	No information
Surveyor	Surveyor Disciplines	Security Official Name	Security Official Contact
No information	No information		
Request Date			
08/03/2023			

Figure 10: Role Request Submitted Notification

Notes:

- The pending request appears under **Pending Requests** at the bottom of the screen.
- The role must be approved by the SO. Approval can take up to several days. For more information on user roles, refer to the [iQIES User Roles Matrix](#).

iQIES Service Center

The iQIES Service Center supports users working within the various iQIES components: S&C, Patient Assessment, and Reporting.

Assistance Accessing iQIES:	Contact the iQIES SO for your organization
Technical Support:	<p>Contact the iQIES Service Center:</p> <p>Phone: 888-477-7876 (select Option 1)</p> <p>Email: iQIES@cms.hhs.gov</p>
CCSQ Support Central:	<p>Create a new ticket or track an existing ticket:</p> <p>https://cmsqualitysupport.servicenowservices.com/ccsq_support_central</p>
Idea Portal:	<p>Submit, comment, vote, and follow ideas on how to improve or enhance iQIES. Go to CCSQ Support Central and click on Idea Portals to log into the Idea Portal. Refer to the iQIES Idea Portal Manual for further information.</p>
More information on iQIES:	<p>Refer to QTSO and the Quality, Safety, & Education Portal (QSEP). Logging in to HARP may be required before accessing some documentation in QTSO and QSEP.</p> <p>iQIES reference materials include:</p> <ul style="list-style-type: none">• Links to Training Videos for providers• Assessment Management User Manual• Quick Reference Guides• Manage User Information• Other helpful iQIES material <p>iQIES training materials on QSEP include S&C Foundation Series Videos</p>