



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Survey and Certification Security Official User Role Job Aid

Version 1.1

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1. Introduction

This job aid addresses how the Security Official (SO) assigns and removes additional roles to the State Agency S&C General User role.

Refer to the [iQIES User Roles Matrix](#) for detailed information on roles.

2. Assign a User Role

2.1 [Log in to iQIES](#).

2.2 Click **Search** from the **User Management** drop-down menu. See *Figure 1, Search*. The **Search** window opens.

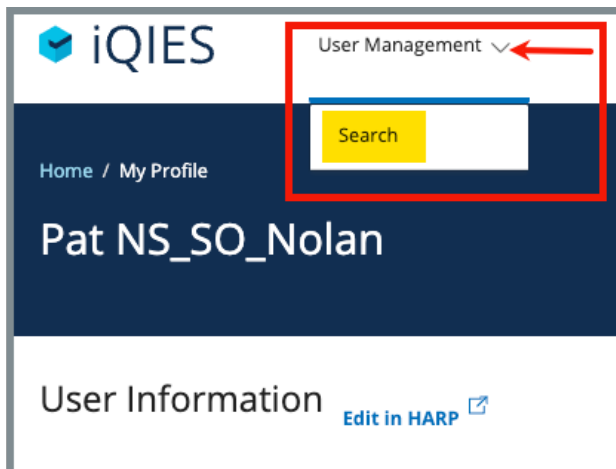


Figure 1: Search

2.3 Type user name under **Search for Users**. See *Figure 2, Search for User*.

Tip: Use **Advanced Search** to easily narrow down user.

2.4 Click **Search**.

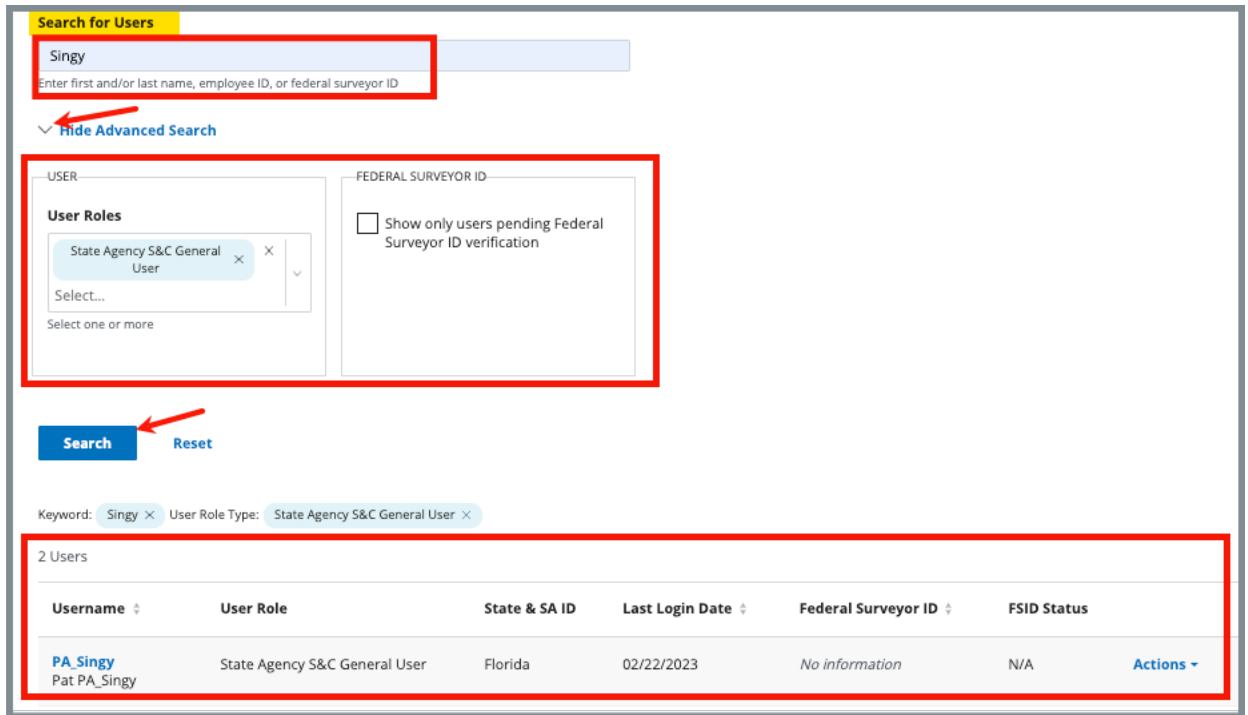


Figure 2: Search for User

2.5 Click user name or select **Assign Roles** under **Actions** drop-down menu. See *Figure 3, Select User*. The **Assign User Roles** window opens.

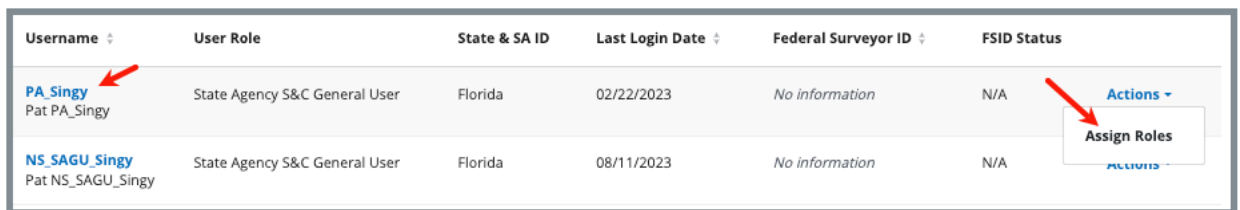


Figure 3: Select User

2.6 Click the box next to the user role to assign a role. See *Figure 4, Assign User Roles*.

Note: Click the information icon next to any user role to find out more about that user role.

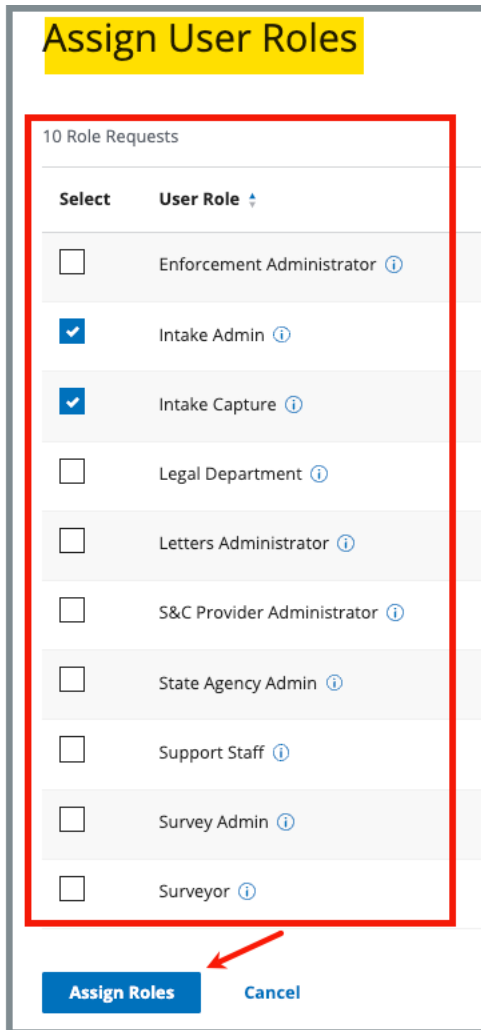


Figure 4: Assign User Roles

2.7 Click **Assign Roles**. The **Search** window opens with the updated user roles noted. See *Figure 5, Updated User Roles*.

Username	User Role	State & SA ID	Last Login Date	Federal Surveyor ID	FSID Status	
PA_Singy Pat PA_Singy	State Agency S&C General User Intake Admin Intake Capture	Florida	02/22/2023	No information	N/A	Actions

Figure 5: Updated User Roles

3. Remove a User Role

- 3.1 Click **Search** from the **User Management** drop-down menu. The **Search** window opens.
- 3.2 Type user name under **Search for Users**.
Tip: Use **Advanced Search** to easily narrow down user.
- 3.3 Click **Search**.
- 3.4 Click the user name to update. Or select **Assign Roles** from the **Actions** drop-down menu. The **Assign User Roles** window opens.
- 3.5 Uncheck the box next to the role to remove a user role.
- 3.6 Click **Assign Roles**.
- 3.7 Verify under **User Role** that the role was removed.

4. Assign/Verify/Remove an FSID

4.1 Assign an FSID

4.1.1 Click **Search** from the **User Management** drop-down menu. The **Search** window opens.

4.1.2 Type user name under **Search for Users**.

Tip: Use **Advanced Search** to easily narrow down user.

4.1.3 Click **Search**.

4.1.4 Click **Enter Federal Surveyor ID** under **Federal Surveyor ID**. See *Figure 6, Enter FSID*. The **Enter Federal Surveyor ID** drop-down window opens.

Username	User Role	State & SA ID	Last Login Date	Federal Surveyor ID	FSID Status	Actions
hp_stateAgency Pat hp_stateAgency	State Agency S&C General User Intake Capture Legal Department Letters Administrator State Agency Admin...	Florida 1	05/03/2022	Enter Federal Surveyor ID	N/A	Actions

Figure 6: Enter FSID

4.1.5 Type the FSID. See *Figure 7, FSID Drop-Down Window*.

Federal Surveyor ID

Enter Federal Surveyor ID

Enter Federal Surveyor ID

65745

Save Cancel

Figure 7: FSID Drop-Down Window

4.1.6 Click **Save**.

Note: The **FSID Status** is now **Pending**.

4.2 Verify an FSID

4.2.1 Click **Verify** on the **Actions** drop-down menu. See *Figure 8, Verify FSID*. The **Are you sure?** pop-up window opens.

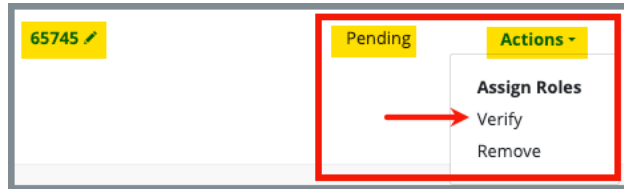


Figure 8: Verify FSID

4.2.2 Click **Verify**. See *Figure 9, Are you sure? Pop-Up Window*. The FSID number now shows under **FSID Status**.

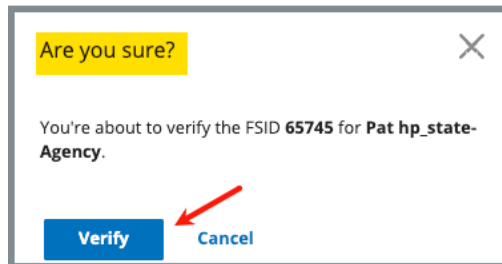


Figure 9: Are you sure? Pop-Up Window

4.3 Remove an FSID

Note: Only FSIDs with a status of **Pending** can be removed.

- 4.3.1 Click **Remove** on the **Actions** drop-down menu. See *Figure 10, Remove FSID*. The **Are you sure?** pop-up window opens.

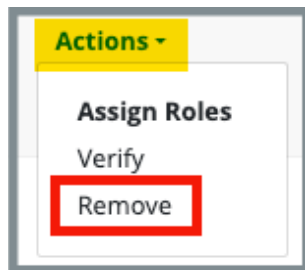


Figure 10: Remove FSID

- 4.3.2 Click **Remove**. See *Figure 11, Are you sure? Remove FSID*.

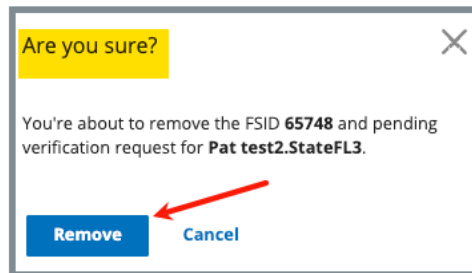


Figure 11: Are you sure? Remove FSID