



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Survey and Certification: Training Environment Access

Job Aid:

State Agency General User

Contract Surveyor (State, Federal, Admin)

CMS General User

CMS View Only User

Job Aid

Version 3.1

April 8, 2025

1. Introduction

This job aid outlines the steps the State Agency General User, a Contract Surveyor, both for State and CMS, a Contract Survey Admin, a CMS General User, and a CMS View Only User roles need to access iQIES.

- For detailed information about user roles, refer to the **User Roles Matrix** on the [iQIES Help page](#) or on the [QIES Technical Support Website \(QTSO\)](#).
- Contact the iQIES Service Center at 888-477-7876 or iQIES@cms.hhs.gov for technical support.

Click here to see instructions for:

- [State Agency General User Role](#)
- [Contract Surveyor - State](#)
- [Contract Surveyor - CMS](#)
- [CMS General Users Role](#)
- [CMS View Only Users Role](#)

Note: For the **Contract Survey Admin** role follow the steps for [Contract Surveyor - CMS](#).

2. Create an Account in HARP

Notes:

- Users who already have a HARP ID can skip this step and go directly to <https://training-iqies.cms.gov> to request the desired user role.
- HARP is the Health Care Quality Information Systems (HCQIS) Access Roles and Profile.
- There is also a video available: [HARP Registration](#).
- Go to <https://harp.cms.gov/help> for additional questions about HARP.

2.1 Go to the [HARP Registration Page](#). See *Figure 1, Create an Account*.

Create an Account
HCQIS Access Roles and Profile

1 Profile Information 2 Account Information 3 Confirmation

Profile Information

Enter your profile information for identity proofing. HARP uses Experian to help verify your identity. Already called Experian? [Enter a Reference Number](#).

Want to retry a previously failed registration attempt? [Retry Remote Identity Proofing](#).

All fields marked with an asterisk (*) are required.

Legal First Name * Legal Last Name *

Middle Name Date of Birth *
mm/dd/yyyy

Personal Email Address * Confirm Personal Email Address *

Business Email Address * Confirm Business Email Address *

Personal Phone Number * Business Phone Number
() _ - _

Is your address in the United States? *
 Yes No

Home Address Line 1 * Home Address Line 2

City * State *

Zip Code * Zip Code Extension

Social Security Number *

Don't want to enter your SSN? [Initiate Manual Proofing](#)

By registering for HARP, you agree to the [Terms & Conditions](#).

Next >

Figure 1: Create an Account

2.2 Fill out the form.

Note: A red asterisk (*) indicates a required field.

2.3 Click **Next**. The **Account Information** page opens. See *Figure 2, Account Information*.

Note: Next is disabled until all the information is completed.

Profile Information **2** Account Information 3 Confirmation

Account Information

Create your user ID, password, and challenge question.
All fields marked with an asterisk (*) are required.

User ID *

User ID must be between 6-74 characters.

Password * Confirm Password *

- × At least 15 characters
- × Include a lowercase letter
- × Include an uppercase letter
- × Include a number (0-9)

Cannot contain first name, last name, or part of user ID

Challenge Question * ⓘ Challenge Answer *

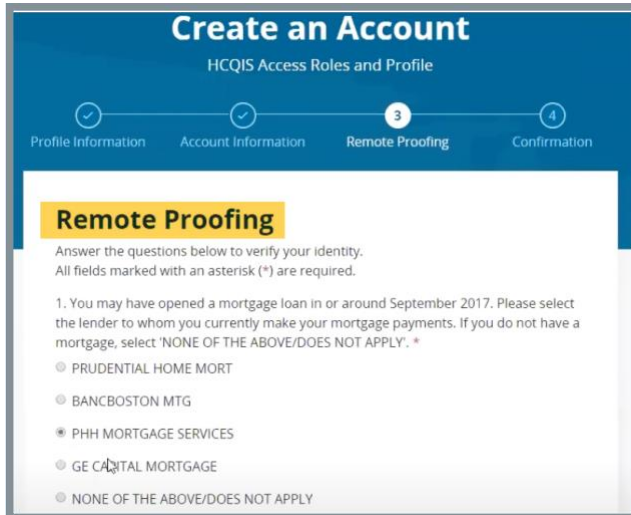
Challenge Answer must be at least 4 characters and cannot contain the challenge question, user ID, or password.

Figure 2: Account Information

2.4 Fill out account information.

- 2.5 Click **Next**. The **Remote Proofing** page opens. See *Figure 3, Remote Proofing*.

Note: Remote proofing is a list of questions to verify the user's identity.

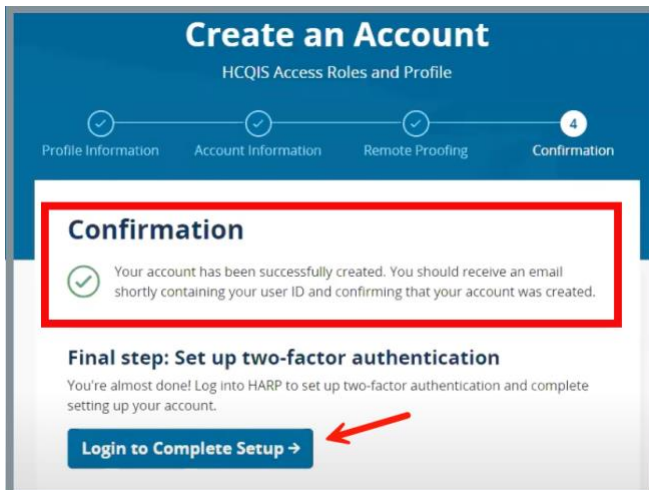


The screenshot shows the 'Create an Account' page for HCQIS Access Roles and Profile. The progress bar at the top indicates four steps: Profile Information, Account Information, Remote Proofing (current step, marked with a '3'), and Confirmation (marked with a '4'). The 'Remote Proofing' section is highlighted with a yellow background. It contains the following text: 'Answer the questions below to verify your identity. All fields marked with an asterisk (*) are required.' Below this is a question: '1. You may have opened a mortgage loan in or around September 2017. Please select the lender to whom you currently make your mortgage payments. If you do not have a mortgage, select: 'NONE OF THE ABOVE/DOES NOT APPLY.' *'. There are five radio button options: PRUDENTIAL HOME MORT, BANCOSTON MTG, PHH MORTGAGE SERVICES (selected), GE CAPITAL MORTGAGE, and NONE OF THE ABOVE/DOES NOT APPLY.

Figure 3: Remote Proofing

- 2.6 Respond to all the questions.
- 2.7 Check **I am not a Robot** checkbox.
- 2.8 Click **Next**. The **Confirmation** page opens and says the account has been successfully created. See *Figure 4, Confirmation*.

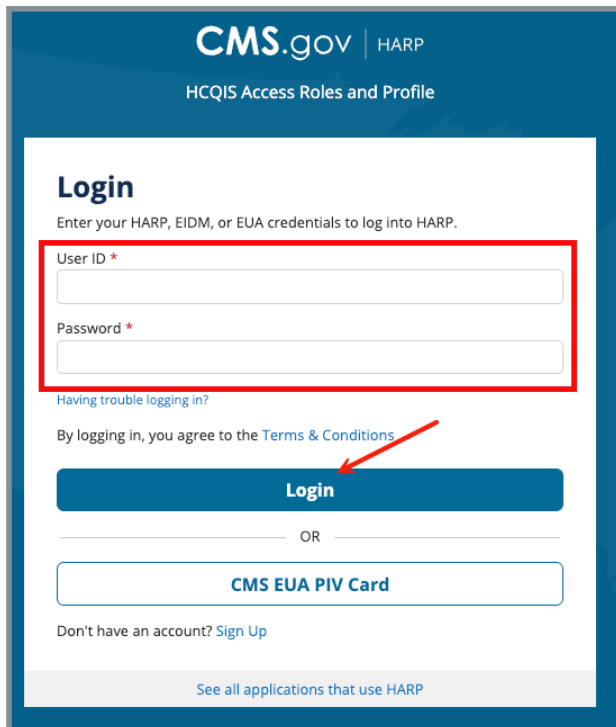
Note: An automated email is sent confirming user ID and account creation.



The screenshot shows the 'Create an Account' page for HCQIS Access Roles and Profile. The progress bar at the top indicates four steps: Profile Information, Account Information, Remote Proofing, and Confirmation (current step, marked with a '4'). The 'Confirmation' section is highlighted with a red border. It contains the following text: 'Your account has been successfully created. You should receive an email shortly containing your user ID and confirming that your account was created.' Below this is a section titled 'Final step: Set up two-factor authentication' with the text: 'You're almost done! Log into HARP to set up two-factor authentication and complete setting up your account.' At the bottom, there is a blue button labeled 'Login to Complete Setup →' with a red arrow pointing to it.

Figure 4: Confirmation

- 2.9 Enter your HARP login information and click **Login to Complete Setup**. The HARP **Login** page opens. See *Figure 5, HARP Login Page*.



The screenshot shows the HARP Login page. At the top, it says "CMS.gov | HARP" and "HCQIS Access Roles and Profile". Below that is a "Login" section with the instruction "Enter your HARP, EIDM, or EUA credentials to log into HARP." There are two input fields: "User ID *" and "Password *", both highlighted with a red box. Below the password field is a link "Having trouble logging in?". A blue "Login" button is highlighted with a red arrow. Below the button is an "OR" separator and a "CMS EUA PIV Card" button. At the bottom, there is a link "Don't have an account? Sign Up" and a footer link "See all applications that use HARP".

Figure 5: HARP Login Page

- 2.10 Set up two-factor authentication. See *Figure 6, Set Up Two-Factor Authentication*.



The screenshot shows the "Set Up Two-Factor Authentication" page. At the top, it says "CMS.gov | HARP" and "HCQIS Access Roles and Profile". Below that is a yellow header "Set Up Two-Factor Authentication" with the text "You are required to set up two-factor authentication. Enter the fields below to add one or more two-factor authentication devices to your account. Learn More →". Below that is a note "All fields marked with an asterisk (*) are required." There is an "Add Device" section with a "Device Type *" dropdown menu, which is highlighted with a red box and a red arrow pointing to the dropdown arrow.

Figure 6: Set Up Two-Factor Authentication

- a. **Select Device Type:** Choose preferred device type from the drop-down

b. **Enter Phone Number or Email:** Type phone number or email address.

The screenshot shows the 'Enter Code' section of the CMS.gov HARP interface. The page title is 'CMS.gov | HARP' and the subtitle is 'HCQIS Access Roles and Profile'. The main heading is 'Enter Code' in a yellow box. Below it, the text reads 'Enter the security code to verify your account.' There is a text input field labeled 'Security Code *' which is highlighted with a red border. Below the input field are two buttons: 'Submit' and 'Cancel'. At the bottom, there is a link that says 'Need a new code? Resend Code'.

Figure 7: Security Code

The screenshot shows the 'Set Up Two-Factor Authentication' page in the CMS.gov HARP interface. The page title is 'CMS.gov | HARP' and the subtitle is 'HCQIS Access Roles and Profile'. The main heading is 'Set Up Two-Factor Authentication' in a yellow box. Below it, the text reads 'You are required to set up two-factor authentication. Enter the fields below to add one or more two-factor authentication devices to your account. Learn More →'. A note states 'All fields marked with an asterisk (*) are required.' There is a table with columns 'Device Type', 'Contact', and 'Status'. The first row shows 'SMS' as the device type, with a red arrow pointing to it and the text 'Existing Device' written in red above the row. Below the table is an 'Add Device' section with a 'Device Type *' dropdown menu, which is highlighted with a red border. At the bottom, there is a 'Complete Setup' button, also highlighted with a red border and a red arrow pointing to it.

Figure 8: Additional Devices

- g. Click **Complete Setup** to finish setting up two-factor authentication.

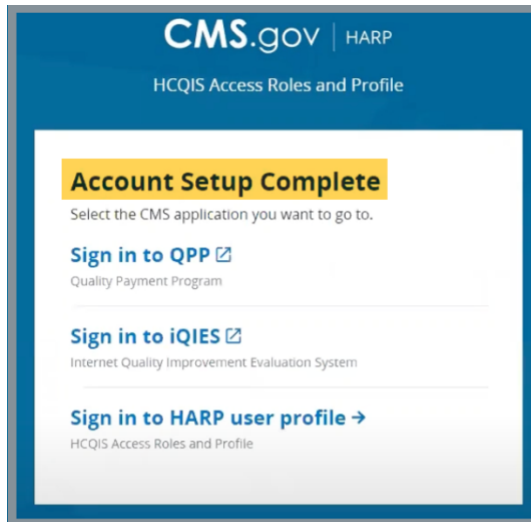


Figure 9: Account Setup Complete

Note: Do not click **Sign in to iQIES** to sign into iQIES. That link goes to

[State Agency General User Role](#)

[Contract Surveyor - State](#)

[Contract Surveyor - CMS](#)

[CMS General Users Role](#)

[CMS View Only Users Role](#)

3. State Agency General User (SAGU)

- 3.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) for further information, if necessary.
- 3.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 10, Request a SAGU User Role*.

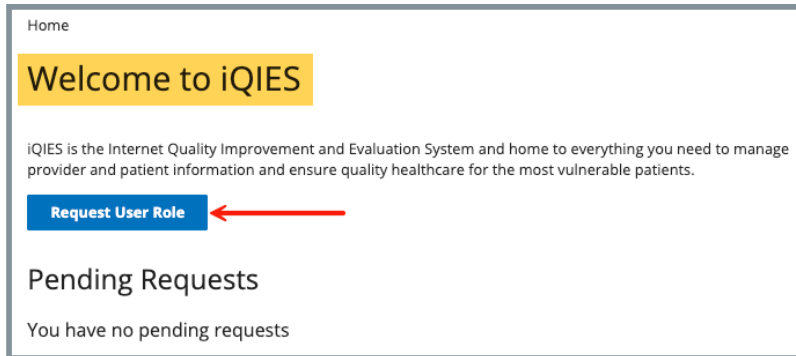


Figure 10: Request a SAGU User Role

- 3.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 11, Select a SAGU User Category*.

Figure 11: Select a SAGU User Category

- 3.4 Select **State Agency**. Click **Next**. The **Select a User Role** page opens. See *Figure 12, Select a SAGU 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

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Figure 12: Select a SAGU User Role

- 3.5 Select State Agency S&C General User.
- 3.6 Click Next. The Add Organizations window opens. See Figure 13, Add Organizations.
- 3.7 Select state from the drop-down menu under **State**.

Note: Do not respond to the question: **Are you a Surveyor?**

STEP 3

Add Organizations

Enter the state for your organization.

State *
Alabama

State Agency Employee ID

Forgot your ID? [?](#)

Are you a Surveyor? Skip Question

Yes
 No

Submit Request Previous

Figure 13: Add Organizations

- 3.1 Click **Submit Request**. The **User Information/Pending Requests** page opens. The **Role Request Submitted** green notification banner shows on the top of the page and the pending request is shown under **Pending Requests**. See *Figure 14, SAGU Role Request Submitted Notification*.

4. Contract Surveyor - State

- 4.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) for further information, if necessary.
- 4.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 15, Request a Contract Surveyor State User Role*.

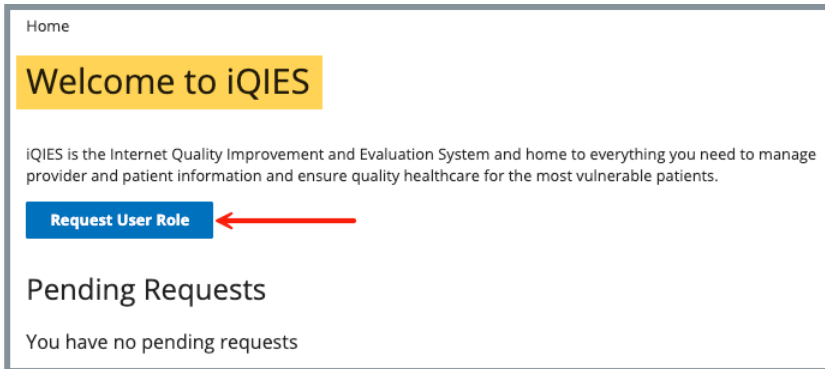


Figure 15: Request a Contract Surveyor User Role

- 4.3 Click Request User Role. The Select a User Category page opens. See *Figure 16, Select a User Category*.

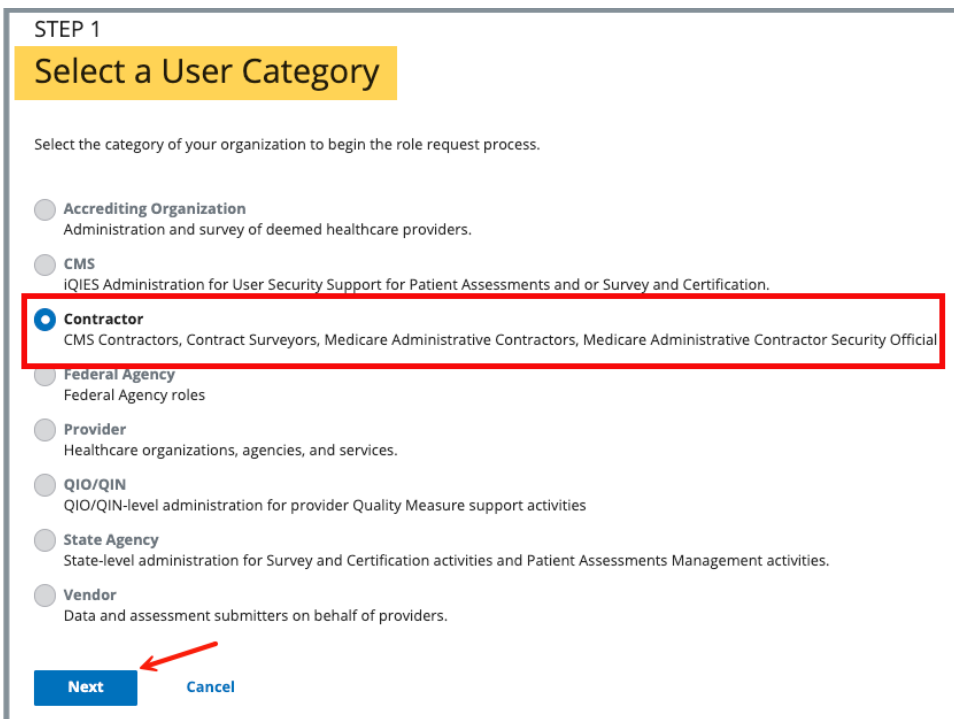


Figure 16: Select a User Category

- 4.4 Select **Contractor**. Click **Next**. The **Select a User Role** page opens. See *Figure 17, Select a User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- Medicare Administrative Contractor Security Official**
MAC Account Approval
- MAC Reports**
Allows Medicare Administrative Contractor (MAC) Agents to select, run and create reports as needed
- Contract Surveyor**
Surveyor that is contracted with either CMS or a specific state
- MAC OASIS API Access**
Access OASIS Assessments via API
- MAC MDS API Access**
Access MDS Assessments via API
- ADO MDS API Access**
MDS Assessments Retrieval API
- ADO Contractor Security Official**
ADO Contractor User Account Approvals
- ADO OASIS API Access**
OASIS Assessment Retrieval API
- CLIA Billing Contractor**
Provides access to CLIA functionality for CLIA Billing Contractors
- Contract Survey Admin**
Contractor Role with additional privileges to coordinate and manage CMS-directed surveys

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Figure 17: Select a User Role

- 4.5 Select Contract Surveyor.
- 4.6 Click Next. The Add Organizations window opens. See *Figure 18, Add Organizations*.

STEP 3

Add Organizations

Organization *

CMS

State

State *

Alabama

Contract Organization *

University of Colorado × Select...

Select one or more

Are you a New or Existing Surveyor? *

New

Existing

Federal Surveyor ID

Forgot your ID? ?

Confirm Federal Surveyor ID

Submit Request Previous

Figure 18: Add Organizations

- 4.7 Select State under Organization.
- 4.8 Select a state from the drop-down menu.
- 4.9 Select a Contract Organization from the drop-down menu.
Note: More than one Contract Organization can be selected.
- 4.10 Select New or Existing to the question, Are you a New or Existing Surveyor?
- 4.11 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 19, Contract Surveyor-State Role Request Submitted Notification Banner*.

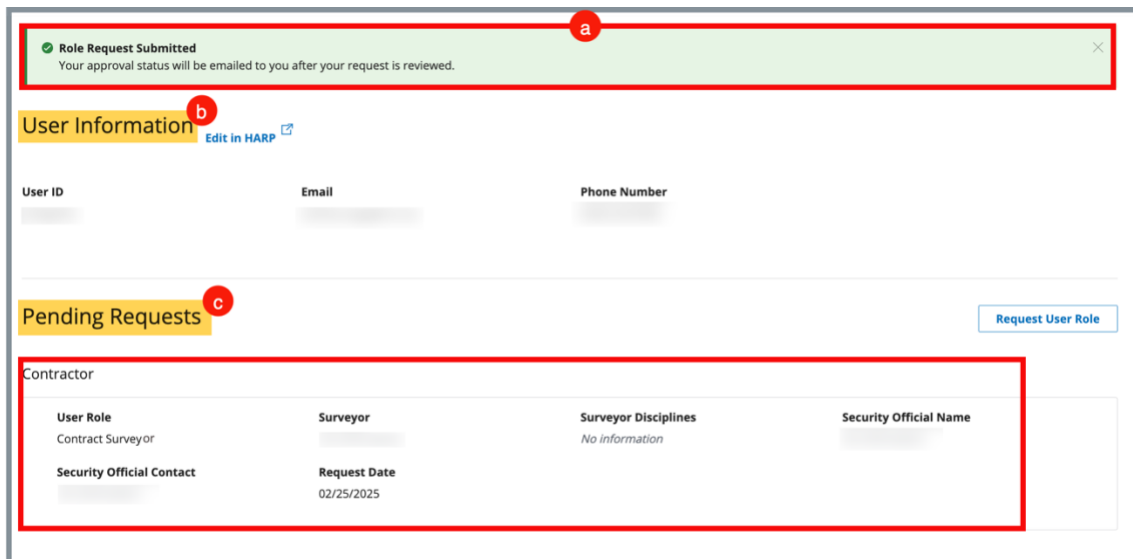


Figure 19: Contract Surveyor-State Role Request Submitted Notification

- a. Green successful submission notification banner.
- b. **User Information** section. This section can be edited in HARP. Click **Edit in HARP** and a new tab opens in HARP.
- c. **Pending Requests** section, which notes the user role requested, the Surveyor and Surveyor Disciplines (selected when the role is approved), the Security Official (SO) name and contact information, along with the user role request date.

Notes:

- The role must be approved by the designated SO. Approval can take up to several days.
- An email will arrive from <http://donotreply.HARP@hcqis.org> noting whether the role was approved or rejected. Contact [the iQIES Service Center](#) if no email is received within several days.

- 4.12 Log back into iQIES once the role has been approved. The **Profile** page opens and a red notification banner shows at the top of the page. See *Figure 20, Missing Discipline Red Banner Notification*.

Note: The notification banner may be specific about which discipline is missing. Be sure to take note.

Missing Discipline
Please select at least 1 primary discipline for the following role(s): Contract Surveyor

User Information [Edit in HARP](#)

User ID	Email	Phone Number
testest	testest@fake.org	123

Pending Requests [Request User Role](#)

You have no pending role requests.

User Roles

Contractor

User Role	Surveyor	Surveyor Disciplines
Contract Surveyor - Alabama	Yes	No information

[Edit](#)

Figure 20: Missing Discipline Red Banner Notification

4.13 Click **Edit** under **User Roles**. The **Surveyor Discipline** fields open. See *Figure 21, Surveyor Disciplines*.

User Roles

Contractor

User Role	Surveyor
Contract Surveyor - Alabama	Yes

Surveyor Disciplines *

Select all applicable disciplines.

<input type="checkbox"/> Registered Nurse	<input type="checkbox"/> Physician	<input type="checkbox"/> Other
<input type="checkbox"/> Licensed Practical (Vocational) Nurse	<input type="checkbox"/> Architect	<input type="checkbox"/> Nutritionist/Dietitian; Qualified Intellectual Disability Professional (QIDP)
<input type="checkbox"/> Physical Therapist	<input type="checkbox"/> Cytotechnologist	<input type="checkbox"/> Pathologist
<input type="checkbox"/> Occupational Therapist	<input type="checkbox"/> Engineer	<input type="checkbox"/> Registered Nurse; Qualified Intellectual Disability Professional (QIDP)
<input type="checkbox"/> Speech Pathologist/Audiologist/Therapist	<input type="checkbox"/> Physician; Qualified Intellectual Disability Professional (QIDP)	<input type="checkbox"/> Social Worker; Qualified Intellectual Disability Professional (QIDP)
<input type="checkbox"/> Social Worker	<input type="checkbox"/> Health Care Administrator	<input type="checkbox"/> Speech Pathologist/Audiologist/Therapist; Qualified Intellectual Disability Professional (QIDP)
<input type="checkbox"/> Home Health Aide	<input type="checkbox"/> Human Services Professional	<input type="checkbox"/> Firefighter
<input type="checkbox"/> Pharmacist	<input type="checkbox"/> Life Safety Code Inspector	<input type="checkbox"/> Fire Protection Specialist
<input type="checkbox"/> Nutritionist/Dietitian	<input type="checkbox"/> Psychologist	<input type="checkbox"/> Facility Manager
<input type="checkbox"/> Sanitarian	<input type="checkbox"/> Recreational Therapist; Qualified Intellectual Disability Professional (QIDP)	<input type="checkbox"/> Chaplain/Pastoral Counselor
<input type="checkbox"/> Generalist	<input type="checkbox"/> Medical Records Administrator	<input type="checkbox"/> Bereavement Counselor
<input type="checkbox"/> Laboratorian	<input type="checkbox"/> Speech Therapist	<input type="checkbox"/> Spiritual Counselor
<input type="checkbox"/> Medical Technologist	<input type="checkbox"/> X-Ray Specialist	

Figure 21: Surveyor Disciplines

4.14 Select at least one discipline.

Notes:

- More than one discipline can be selected.
- Review notification banner to see if specific disciplines are requested.

4.15 Click **Save**.

5. Contract Surveyor – CMS

- 5.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) for further information, if necessary.
- 5.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 22, Request a Contract Surveyor State User Role*.

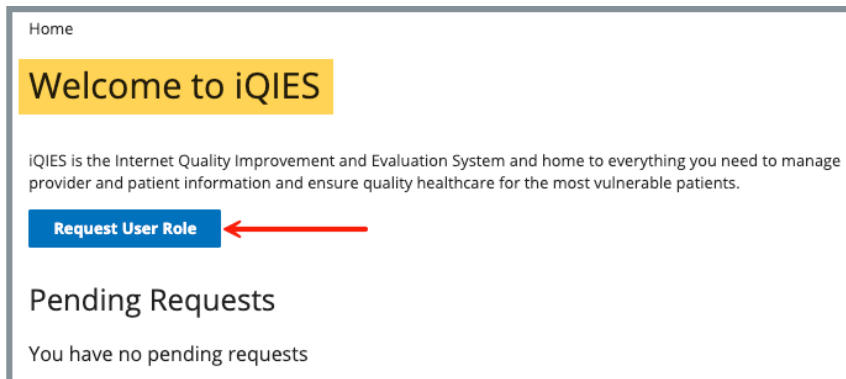


Figure 22: Request a Contract Surveyor User Role

- 5.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 23, Select a User Category*.

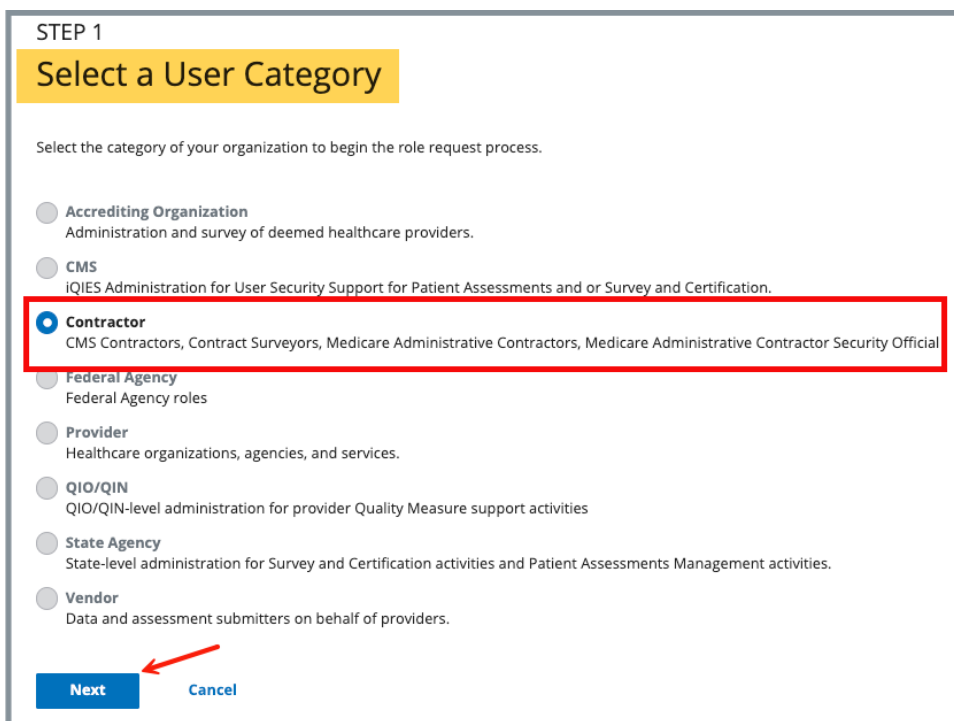


Figure 23: Select a User Category

- 5.4 Select **Contractor**. Click **Next**. The **Select a User Role** page opens. See *Figure 24, Select a User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- Medicare Administrative Contractor Security Official
MAC Account Approval
- MAC Reports
Allows Medicare Administrative Contractor (MAC) Agents to select, run and create reports as needed
- Contract Surveyor
Surveyor that is contracted with either CMS or a specific state
- MAC OASIS API Access
Access OASIS Assessments via API
- MAC MDS API Access
Access MDS Assessments via API
- ADO MDS API Access
MDS Assessments Retrieval API
- ADO Contractor Security Official
ADO Contractor User Account Approvals
- ADO OASIS API Access
OASIS Assessment Retrieval API
- CLIA Billing Contractor
Provides access to CLIA functionality for CLIA Billing Contractors
- Contract Survey Admin
Contractor Role with additional privileges to coordinate and manage CMS-directed surveys

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Figure 24: Select a User Role

- 5.5 Select Contract Surveyor.

Note: Select **Contract Survey Admin** for the Admin role. Follow the rest of the steps.

- 5.6 Click **Next**. The **Add Organizations** window opens. See *Figure 25, Add Organizations*.

STEP 3

Add Organizations

Organization *

CMS
 State

Contract Organization *

University of Colorado × Select... →

Select one or more

Are you a New or Existing Surveyor? *

New
 Existing

Select...

Ascellon Corporation
ASCT Services
CertiSurv
Copeland and Conner Healthcare Staffing
Healthcare Management Solutions
University of Colorado

Submit Request Previous

Figure 25: Add Organizations

- 5.7 Select **CMS** under **Organization**.
- 5.8 Select a **Contract Organization** from the drop-down menu.
Note: More than one **Contract Organization** can be selected.
- 5.9 Select New or Existing to the question, Are you a New or Existing Surveyor?
- 5.10 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 26, Contract Surveyor-CMS Role Request Submitted Notification*.

Note: The notification banner may be specific about which discipline is missing. Be sure to take note.

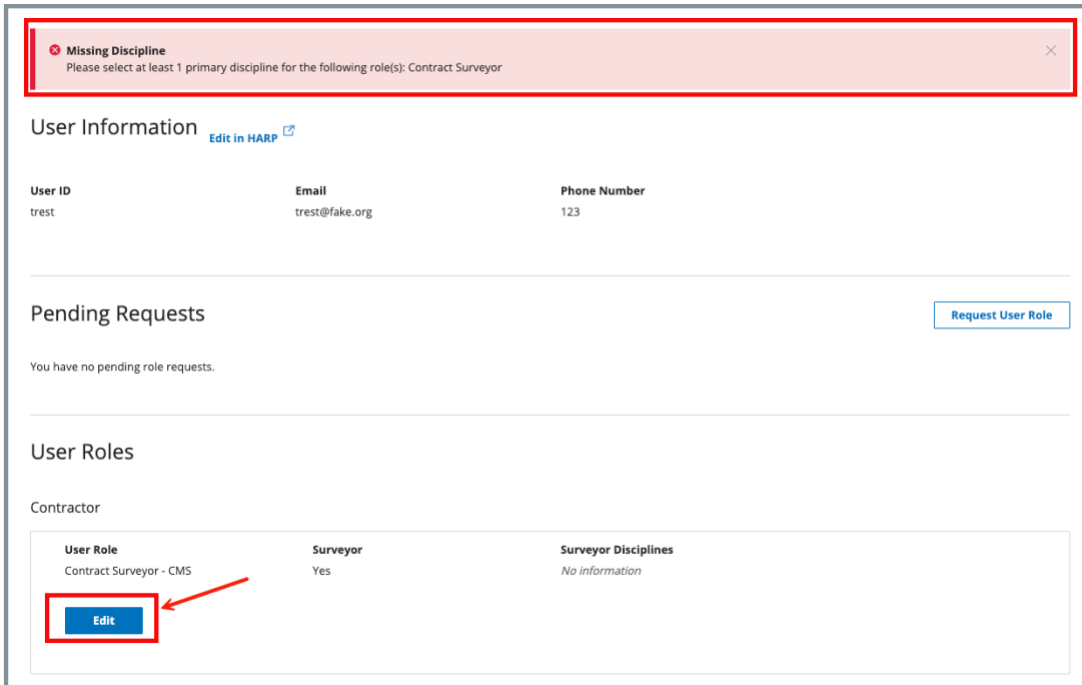


Figure 27: Missing Discipline Red Banner Notification

5.12 Click **Edit** under User Roles. The **Surveyor Discipline** fields open. See *Figure 28, Surveyor Disciplines*.

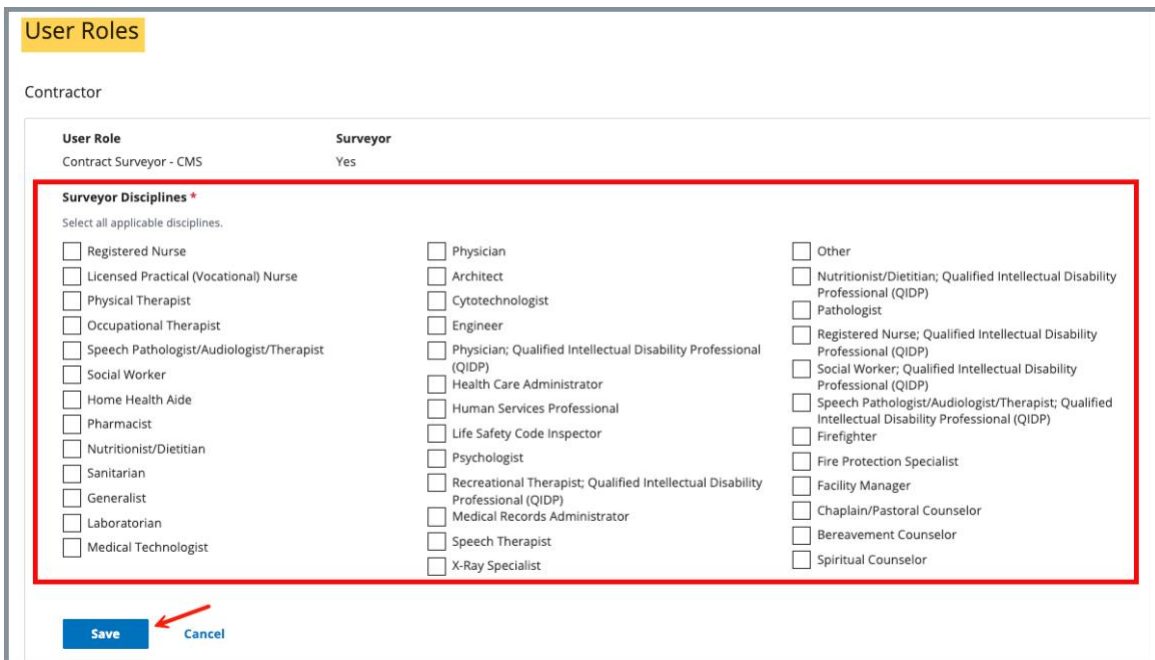


Figure 28: Surveyor Disciplines

5.13 Select at least one discipline.

Notes:

- More than one discipline can be selected.
- Review notification banner to see if specific disciplines are requested.

5.14 Click **Save**.

6. CMS General User (CMSGU)

- 6.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) for further information, if necessary.
- 6.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 29, Request a CMS User Role*.

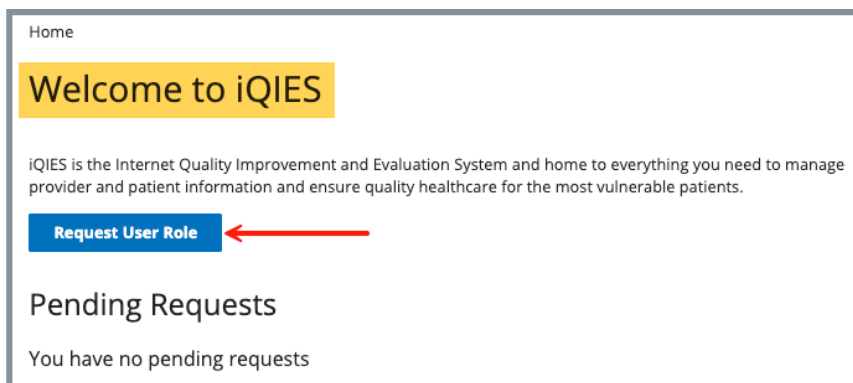


Figure 29: Request a CMS User Role

- 6.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 30, Select a CMS User Category*.

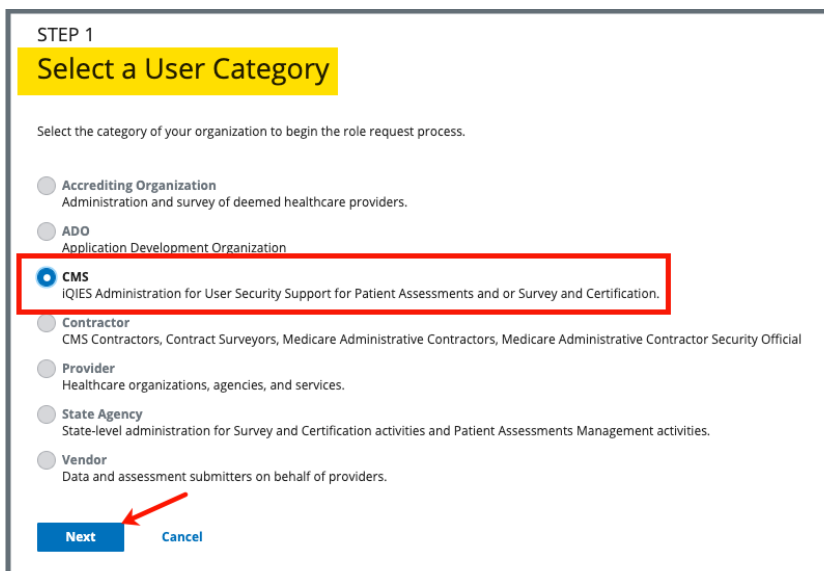


Figure 30: Select a CMS User Category

- 6.4 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 31, Select a CMS User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

CMS View Only User
View patient profiles, view assessments, generate and view reports.

CMS General User
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.

iQIES Help Desk
iQIES system support.

iQIES Help Desk Production Control
Approve, Reject, and Remove User Requests; Manage ICD-10 exclusions and patient assessment information, view patient profile and assessments, manage patient assessments, run provider reports.

CMS Security Official
iQIES user account approvals.

Office of Financial Management User
Track CMPTS cases; record CMPTS payments

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Figure 31: Select a CMS User Role

- 6.5 Select CMS General User.
- 6.6 Click **Next**. The **Add Organizations** window opens. See *Figure 32, Add Organizations*.

Note: Do not respond to the question: **Are you a Surveyor?**

STEP 3

Add Organizations

This role does not require the addition of organizations.

Are you a Surveyor?

Yes **Skip Question**

No

[Submit Request](#) [Previous](#)

Figure 32: Add Organizations

- 6.7 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 33, CMS General User Role Request Submitted Notification*.

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

User Information [Edit in HARP](#)

User ID	Email	Phone Number

Pending Requests [Request User Role](#)

Contractor	User Role	Surveyor	Surveyor Disciplines	Security Official Name
	CMS General User	No information	No information	
	Security Official Contact	Request Date		
		02/25/2025		

Figure 33: CMS General User Role Request Submitted Notification

- Green successful submission notification banner.
- User Information** section. This section can be edited in HARP. Click **Edit in HARP** and a new tab opens in HARP.
- Pending Requests** section, which notes the user role requested, the Surveyor and Surveyor Disciplines (selected when the role is approved), the Security Official (SO) name and contact information, along with the user role request date.

Notes:

- The role must be approved by the designated SO. Approval can take up to several days.
- An email will arrive from <http://donotreply.HARP@hcqis.org> noting whether the role was approved or rejected. Contact [the iQIES Service Center](#) if no email is received within several days.

7. CMS View Only User

- 7.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) for further information, if necessary.
- 7.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 34, Request a CMS View Only User Role*.

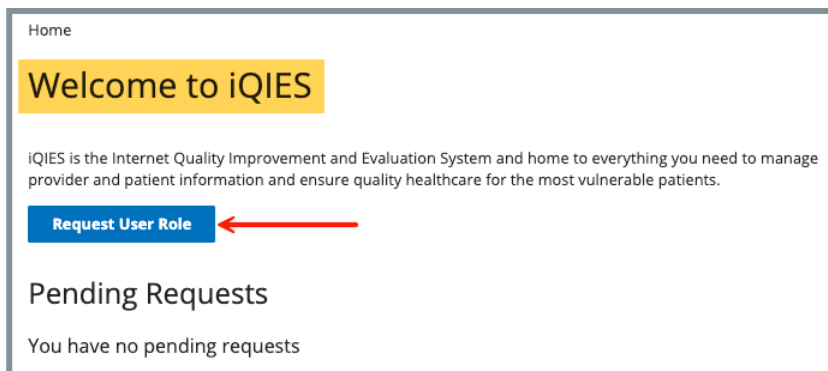


Figure 34: Request a CMS View Only User Role

- 7.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 35, Select a CMS View Only User Category*.

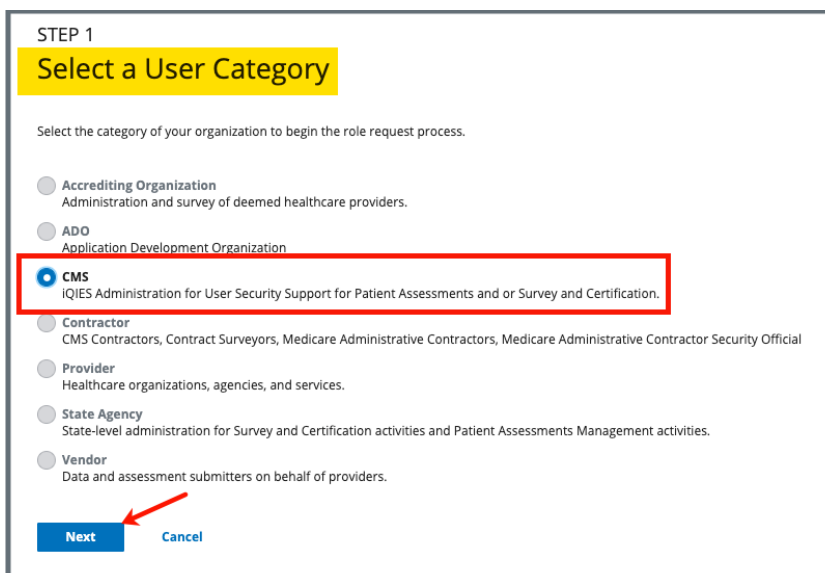


Figure 35: Select a CMS View Only User Category

- 7.4 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 36, Select a CMS View Only User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- CMS View Only User**
View patient profiles, view assessments, generate and view reports.
- CMS General User**
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.
- iQIES Help Desk**
iQIES system support.
- iQIES Help Desk Production Control**
Approve, Reject, and Remove User Requests; Manage ICD-10 exclusions and patient assessment information, view patient profile and assessments, manage patient assessments, run provider reports.
- CMS Security Official**
iQIES user account approvals.
- Office of Financial Management User**
Track CMPTS cases; record CMPTS payments

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Figure 36: Select a CMS View Only User Role

7.5 Select CMS General User.

7.6 Click **Next**. The **Add Organizations** window opens. See *Figure 37, Add Organizations*.

STEP 3

Add Organizations

This role does not require the addition of organizations.

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Figure 37: Add Organizations

7.7 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 38, CMS View Only Role Request Submitted Notification*.

