



iQIES Survey & Certification

Job Aid

Manage User Information and Quick Start Checklist

Overview

This job aid answers questions on how to manage your HARP ID and iQIES user role and gives you a checklist on how to start working in iQIES.

- You must have a HARP ID to access iQIES.
- All users must have a role in iQIES.

Quick Start Checklist

- ☐ Watch the [New User Orientation](#) video for all areas or the [New User Orientation LTC Facilities](#) video for Nursing Homes, or [iQIES Training](#) (Patient Assessment) video.
- ☐ Create a [HARP Account](#)
- ☐ Review [iQIES Roles Matrix Job Aid](#) for detailed information on iQIES roles and privileges
- ☐ Log into [iQIES](#) and request a role.
- ☐ Watch training videos. Go to the [iQIES Video Catalog Job Aid](#) for a list of training video links for both Survey and Certification (S&C) and Patient Assessment.
- ☐ Read the detailed user manuals or view quick reference guides and job aids on [QTSO](#).

Note: The State Agency Reference & Manuals page is behind the State Agency Login on QTSO.

Manage HARP ID

Get a HARP ID

1. Register for a HARP ID at <https://harp.cms.gov/register>. Registration may take from 5 to 15 minutes, depending on how quickly your information can be verified.

Note: HARP verifies your identity with your date of birth and Social Security number, then generates a list of questions to verify your identity.

2. Once approved, you need to go back to HARP and complete HARP registration. You must create a two-factor authentication device using either your cell phone or email address. Once that is complete, you can log in.

I received an error message when trying to register in HARP

You may already have completed some level of identity proofing with CMS in the past. An EIDM (Enterprise Identity Management) account may exist. If you recall that login information, use that. If not, contact gnetsupport@cms.hhs.gov or 866-288-8912.

I forgot my HARP user ID or password

1. Click **Have trouble logging in?** and a new window opens. See *Figure 1, Having Trouble Logging In?*

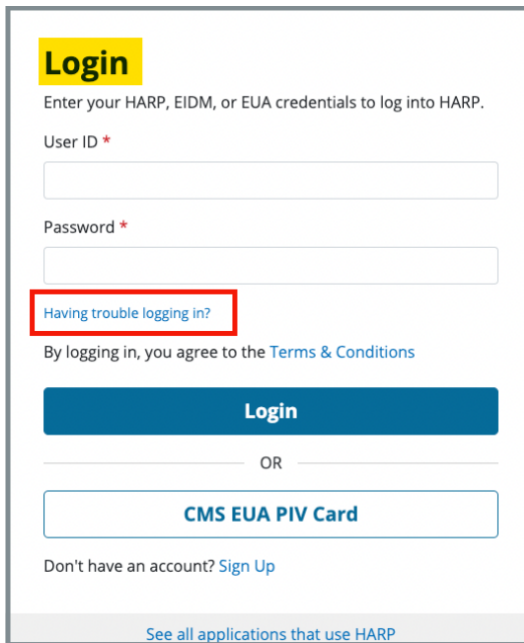
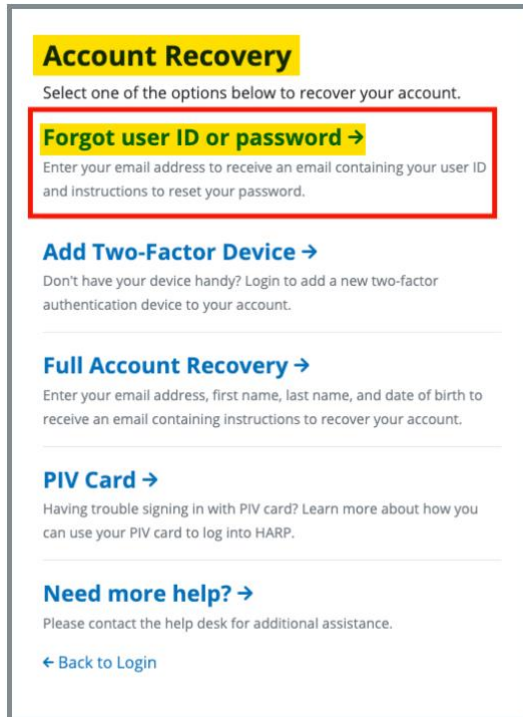


Figure 1: Having Trouble Logging In

2. Click **Forgot User ID or Password**. See *Figure 2, Forgot User ID or Password* and a new window opens.



Account Recovery

Select one of the options below to recover your account.

Forgot user ID or password →

Enter your email address to receive an email containing your user ID and instructions to reset your password.

Add Two-Factor Device →

Don't have your device handy? Login to add a new two-factor authentication device to your account.

Full Account Recovery →

Enter your email address, first name, last name, and date of birth to receive an email containing instructions to recover your account.

PIV Card →

Having trouble signing in with PIV card? Learn more about how you can use your PIV card to log into HARP.

Need more help? →

Please contact the help desk for additional assistance.

[← Back to Login](#)

Figure 2: Forgot User ID or Password

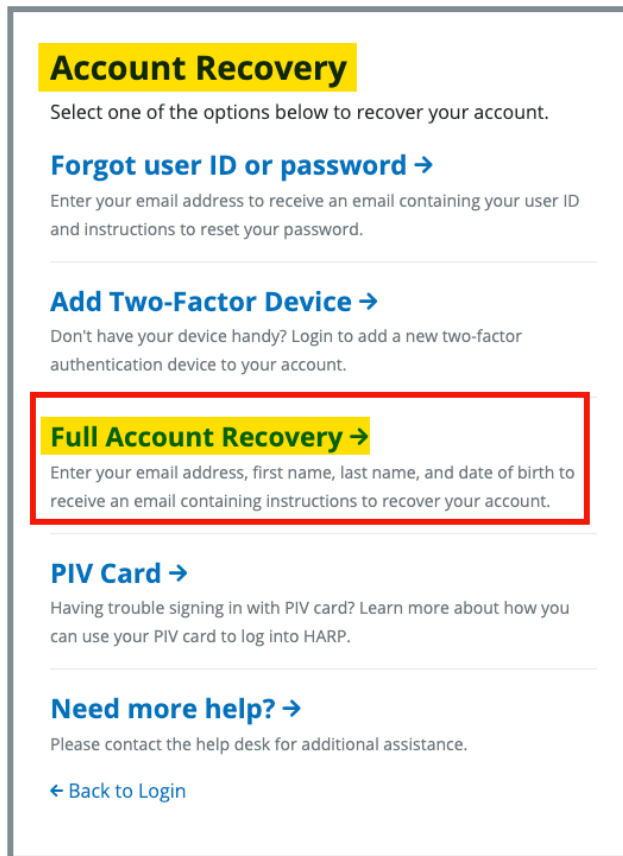
3. Type your email address.
4. Click **Send Email**.

Note: An email with your user ID and a link to reset your password will then be sent to you.

5. Answer the challenge question.
6. Type a new password, then confirm it.
7. Click **Reset Password**.

I forgot my challenge question

1. Click **Have trouble logging in?** in the log in window and a new window opens.
2. Click **Full Account Recovery**. The **Full Account Recovery** window opens. See *Figure 3, Full Account Recovery*.



Account Recovery

Select one of the options below to recover your account.

Forgot user ID or password →

Enter your email address to receive an email containing your user ID and instructions to reset your password.

Add Two-Factor Device →

Don't have your device handy? Login to add a new two-factor authentication device to your account.

Full Account Recovery →

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Having trouble signing in with PIV card? Learn more about how you can use your PIV card to log into HARP.

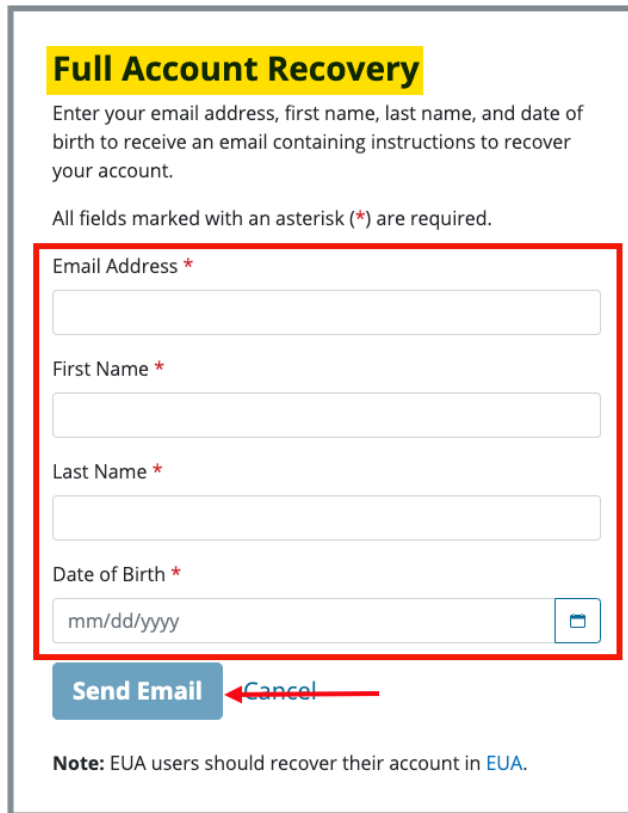
Need more help? →

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[← Back to Login](#)

Figure 3: Full Account Recovery

3. Fill out the form. See *Figure 4, Full Account Recovery Form*. Click **Send Email**.



Full Account Recovery

Enter your email address, first name, last name, and date of birth to receive an email containing instructions to recover your account.

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

Email Address *

First Name *

Last Name *

Date of Birth *

mm/dd/yyyy

Send Email ~~Cancel~~

Note: EUA users should recover their account in [EUA](#).

Figure 4: Full Account Recovery Form

Note: An email with your user ID and a link to recover your account will then be sent to you.

4. Click **Recover Account**.
5. Answer one of the challenge questions.
6. Click **Reset Challenge Question**.
7. Type a new password, then confirm it.
8. Click **Reset Password**.

My account is locked

The account unlocks automatically after one hour. If that is too long to wait, click **Have trouble logging in?** in the log in window and the **Account Recovery** window opens. Click **need more help?**, type your email, and wait for the instructions email.

More HARP FAQs

Additional FAQs for HARP can be found here: <https://harp.cms.gov/login/help>

Manage HARP ID/Password and iQIES User Role

Access iQIES

Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials.

Refer to the [iQIES Onboarding Process](#) for either State Agency Assessment Coordinator role or SAGU (State Agency General User) role , for further information on onboarding in iQIES, if necessary.

Note: You cannot change your HARP User ID by yourself. Contact the Service Center.

How do I contact the iQIES Service Center?

Phone: 800-339-9313

Email: iQIES@cms.hhs.gov

I forgot either my HARP ID or my password

Don't worry. Just click **Forgot your user ID or password?** See *Figure 5, Log In: Forgot My User ID or Password*. The **Forgot User ID or Password** window opens.

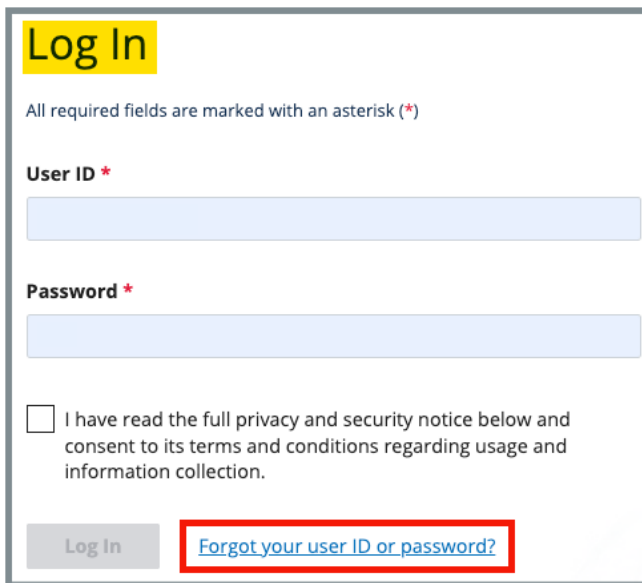


Figure 5: Log In: Forgot My User ID or Password

1. Type your email address. See *Figure 6, Forgot User ID or Password*.

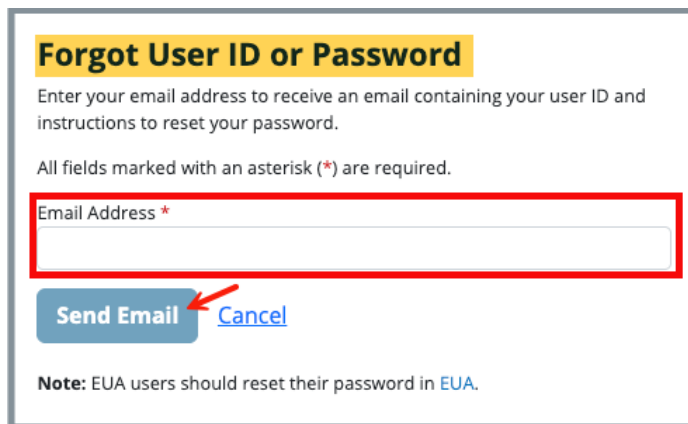


Figure 6: Forgot User ID or Password

2. Click **Send Email**.

How do I choose a role in iQIES?

Refer to the [iQIES User Roles Matrix](#) for detailed information on choosing an iQIES user role. User roles determine what kind of access to the system you will have.

How do I know what role I have in iQIES? Can I change it?

1. Yes. Go to **My Profile** in iQIES.
2. Click the caret next to your name in the top right corner of the screen. Click **My Profile**. See *Figure 7, My Profile*.

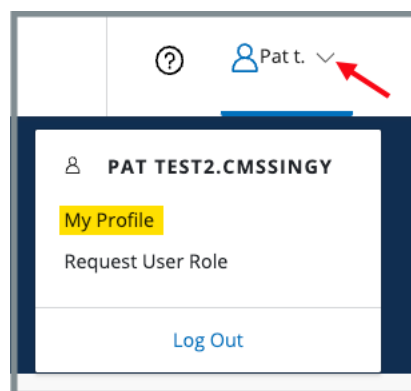


Figure 7: My Profile

3. You can review your pending requests, view the user roles you have, and request a different user role. See *Figure 8, iQIES User Roles*.

Notes:

- You can have more than one role in iQIES.
- A Security Official must approve any outstanding role requests.
- Log in to HARP to delete a pending request or remove a user role. See *Figure 9, View User Roles in HARP*.

Pending Requests			
You have no pending role requests.			

User Roles			
CMS			
User Role CMS View Only User			
User Role	Surveyor	Surveyor Disciplines	
CMS General User	No information	No information	
Edit			
User Role	iQIES Help Desk Production Control		

Figure 8: iQIES User Roles

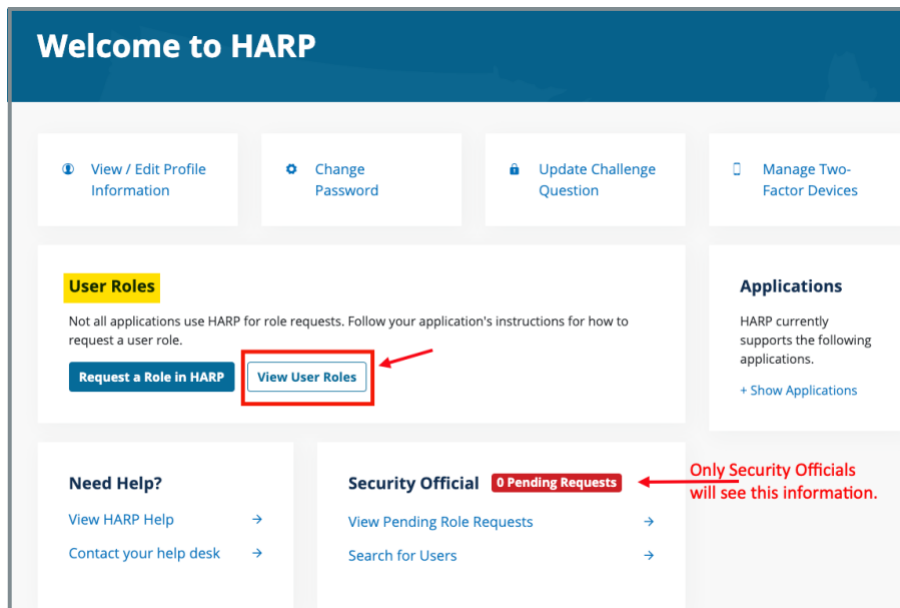


Figure 9: View User Roles in HARP

Can I practice in a test environment in iQIES?

Yes. Review the [iQIES S&C Training Environment Access Job Aid](#) for more help in knowing how to access the training environment.