



## **Centers for Medicare & Medicaid Services**

# **Internet Quality Improvement & Evaluation System (iQIES)**

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## **Clinical Laboratory Improvement Amendments (CLIA) Onboarding Process Job Aid:**

**CLIA Billing Lead Admin**

**CLIA Billing Admin**

**CLIA Billing Contractor**

**CLIA Billing User**

**State Agency – CLIA Billing User**

**Job Aid**

**Version 1.1**

**January 7, 2026**

## 1. Introduction

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This job aid outlines the steps the CLIA Billing Lead Admin, CLIA Billing Admin, CLIA Billing Contractor, CLIA Billing User, and State Agency – CLIA Billing 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](mailto:iQIES@cms.hhs.gov) for technical support.
- HARP is the Health Care Quality Information Systems (HCQIS) Access Roles and Profile.
- A HARP ID is required to log into iQIES.

## 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.
- 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.

The screenshot shows the 'Account Information' page. At the top, there are three tabs: 'Profile Information' (with a checkmark), '2 Account Information' (highlighted in blue), and '3 Confirmation'. The main content area is titled 'Account Information' and contains the following instructions: 'Create your user ID, password, and challenge question. All fields marked with an asterisk (\*) are required.' Below this, there are four input fields: 'User ID \*' (a text input field with a note 'User ID must be between 6-74 characters.'), 'Password \*' (a text input field with a note 'At least 15 characters, include a lowercase letter, include an uppercase letter, include a number (0-9)'), 'Confirm Password \*' (a text input field with a note 'Cannot contain first name, last name, or part of user ID'), and 'Challenge Question \*' (a dropdown menu with a note 'Challenge Answer must be at least 4 characters and cannot contain the challenge question, user ID, or password.'). At the bottom, there are two buttons: '← Back' and 'Next →' (which is highlighted in blue with a red arrow pointing to it).

*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.

**Remote Proofing**

Answer the questions below to verify your identity. All fields marked with an asterisk (\*) are required.

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'. \*

PRUDENTIAL HOME MORT

BANCOSTON MTG

PHH MORTGAGE SERVICES

GE CAPITAL MORTGAGE

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.

**Confirmation**

Your account has been successfully created. You should receive an email shortly containing your user ID and confirming that your account was created.

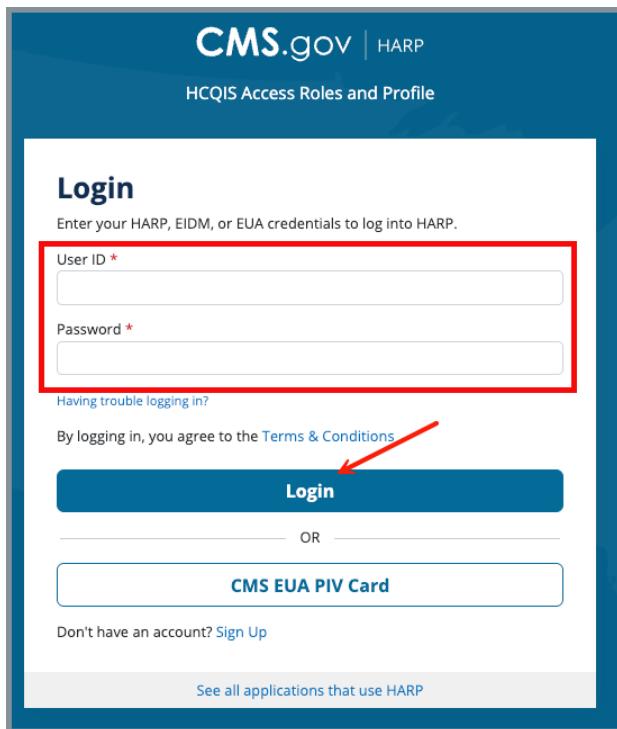
**Final step: Set up two-factor authentication**

You're almost done! Log into HARP to set up two-factor authentication and complete setting up your account.

**Login to Complete Setup →**

*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 image shows the CMS.gov HARP login page. The page has a dark blue header with the CMS.gov logo and 'HARP' text. Below the header, it says 'HCQIS Access Roles and Profile'. The main area is titled 'Login' and contains fields for 'User ID \*' and 'Password \*', both of which are highlighted with a red box. Below these fields is a link 'Having trouble logging in?'. A red arrow points to the 'Login' button. There is also a link 'By logging in, you agree to the Terms & Conditions'. Below the login area is a horizontal line with the text 'OR' in the center. Underneath the 'OR' line is a button labeled 'CMS EUA PIV Card'. At the bottom of the page, there is a link 'Don't have an account? Sign Up' and a 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*.

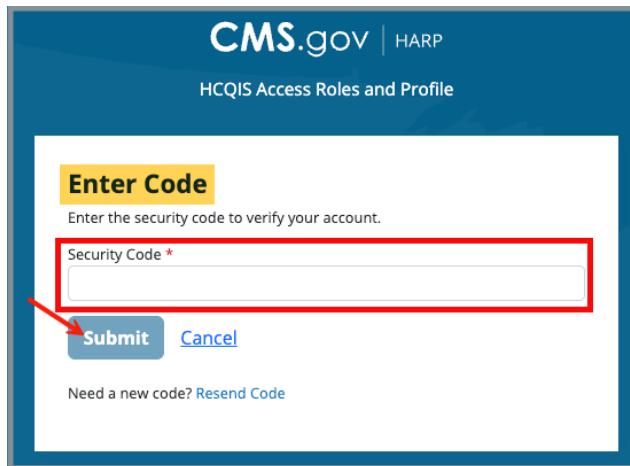


The image shows the 'Set Up Two-Factor Authentication' page. The header is the same as Figure 5: 'CMS.gov | HARP' and 'HCQIS Access Roles and Profile'. A yellow box at the top left contains the title 'Set Up Two-Factor Authentication'. Below this, a message says 'You are required to set up two-factor authentication. Enter the fields below to add one or more two-factor authentication devices to your account. Learn More →'. It also states 'All fields marked with an asterisk (\*) are required.' A red box highlights the 'Add Device' section, and a red arrow points to the 'Device Type \*' dropdown menu.

Figure 6: Set Up Two-Factor Authentication

- a. **Select Device Type:** Choose preferred device type from the drop-down menu – **Text Message, Email, Voice, Google Authenticator, Okta Verify, or Okta Verify Push.**
- b. **Enter Phone Number or Email:** Type phone number or email address.
- c. **Click Send Code** to receive a security code.

d. Type the security code. See *Figure 7, Security Code*.



Enter Code

Enter the security code to verify your account.

Security Code \*

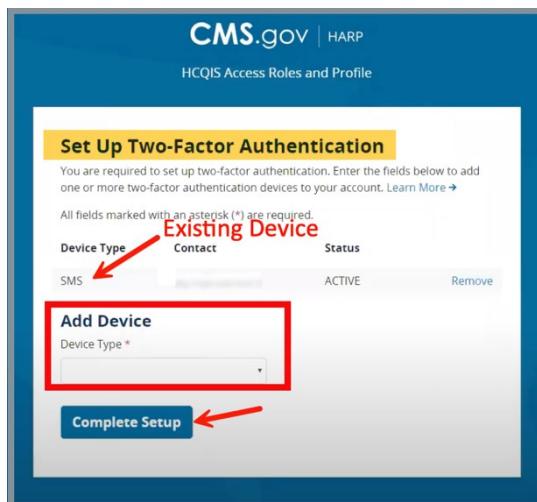
Submit Cancel

Need a new code? [Resend Code](#)

*Figure 7: Security Code*

e. Click **Submit**.

f. Click **Add Device** and select a device from the drop-down menu to add an additional device, if desired. See *Figure 8, Additional Devices*.



Set Up Two-Factor Authentication

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](#)

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

Device Type	Contact	Status	Remove
SMS		ACTIVE	Remove

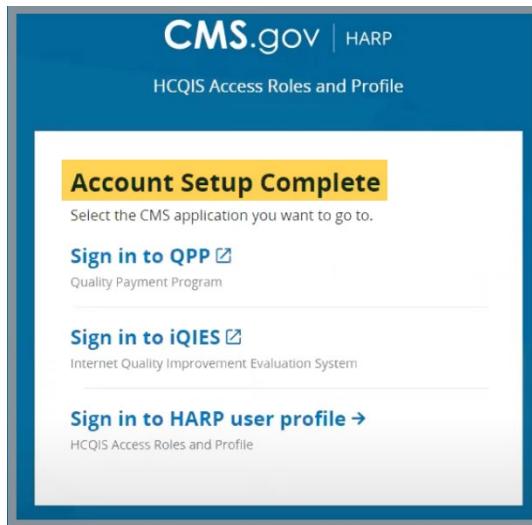
Add Device

Device Type \*

Complete Setup

*Figure 8: Additional Devices*

g. Click **Complete Setup** to finish setting up two-factor authentication. The **Account Setup Complete** window opens. See *Figure 9, Account Setup Complete*.



*Figure 9: Account Setup Complete*

**Note:** Do not click **Sign in to iQIES** to sign into iQIES. That link goes to production iQIES, not the test environment. Follow the steps below for details on the test environment.

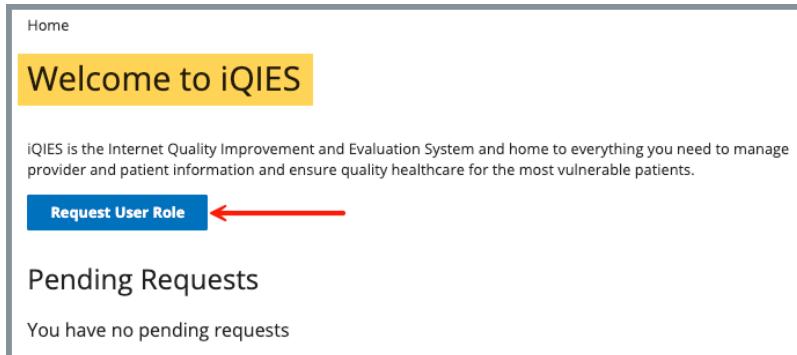
h. Click the user role below to review steps to create that user role in iQIES.

- [CLIA Billing Lead Admin](#)
- [CLIA Billing Admin](#)
- [CLIA Billing Contractor](#)
- [CLIA Billing User](#)
- [State Agency – CLIA Billing User](#)

### 3. CLIA Billing Lead Admin

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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. The Welcome to iQIES page opens. See *Figure 10, Welcome to iQIES*.



*Figure 10: Welcome to iQIES*

**Note:** Existing iQIES users can request a user role after logging in to iQIES. Click profile name and select **Request User Role** from the drop-down menu and then continue following steps below.

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

**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

**Federal Agency**  
Federal Agency roles

**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.

 **Next** **Cancel**

**Figure 11: Select a User Category**

3.3 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 12, Select a User Role*.

**STEP 2**

## Select a User Role

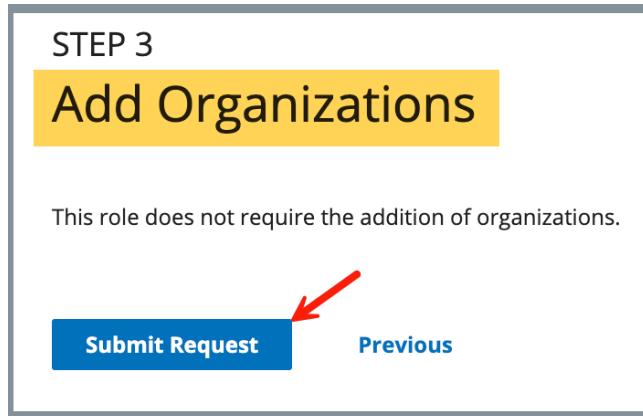
Select the user role that best fits your needs.

- 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
- iQAN Admin**  
For authorized iQAN administrators, access and manage all iQAN functionality per provider type.
- iQAN Provider Type Admin**  
Choose this option to select a provider type -specific iQAN Admin role (e.g. 'iQAN Nursing Home (NH) Admin')
- iQAN Provider Type User**  
Choose this option to select a provider type -specific iQAN User role (e.g. 'iQAN Nursing Home (NH) User')
- CLIA Billing Lead Admin**  
Authorized CLIA administrators can access the CLIA admin portal and accounting functionality.
- CLIA Data Exchange User**  
Choose this option to select a CLIA Data Exchange role
- iQAN Service Desk**  
Authorized CMS support personnel can access iQAN with additional permissions.
- Active Provider File Role**  
Authorized personnel can generate and access Active Provider File
- CLIA Billing User**  
Allow CMS users access to the CLIA Accounting system
- CLIA Billing Admin**  
Allow CMS users with admin privileges access to the CLIA Accounting system
- CLIA Billing Super User (Restricted)**  
Restricted advanced permissions to the CLIA Accounting system

[Next](#) [Previous](#)

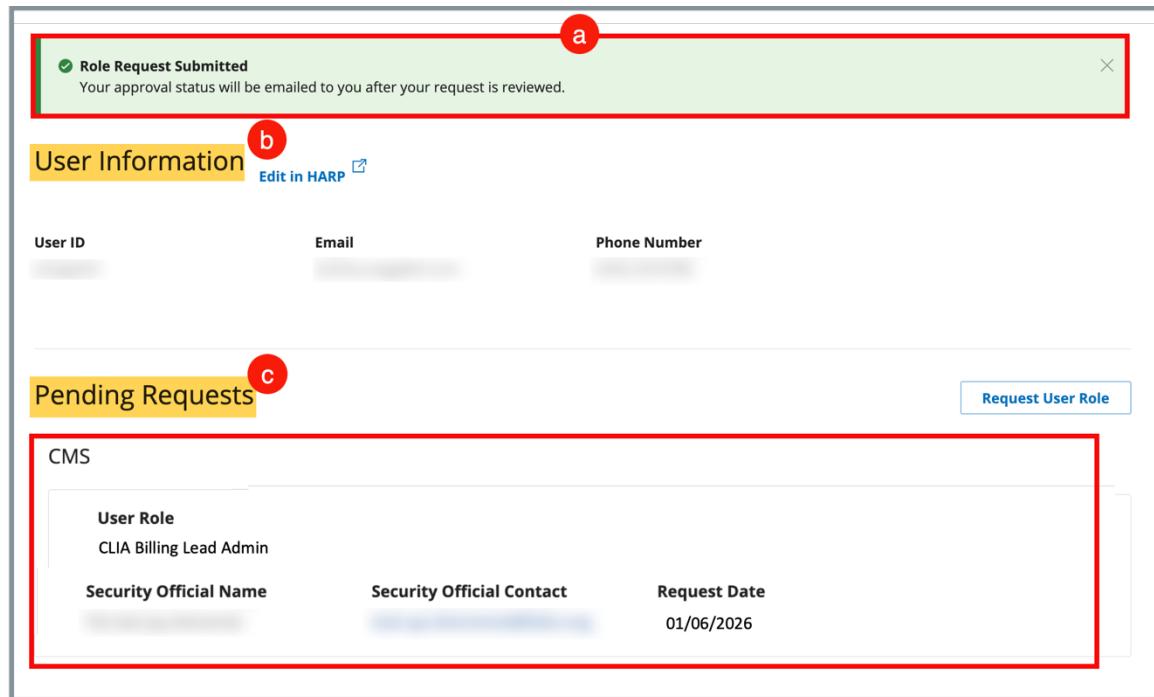
**Figure 12: Select a User Role**

- 3.4 Select **CLIA Billing Lead Admin**.
- 3.5 Click **Next**. The **Add Organizations** window opens. See *Figure 13, Add Organizations*.



*Figure 13: Add Organizations*

3.6 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, Request Submitted Notification*.



*Figure 14: 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.

- c. **Pending Requests** section, which notes the user role requested, the Security Official (SO) name and contact information, along with the user role request date.

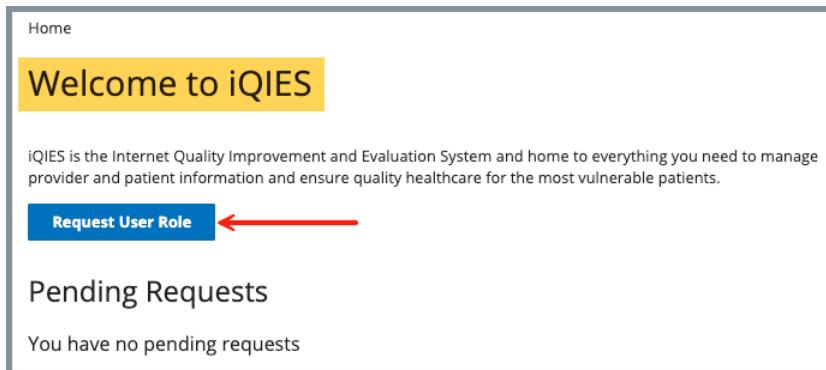
**Notes:**

- The role must be approved by the designated SO. Approval can take up to several days.
- Additional permissions must be granted by the SO. Refer to the **User Roles Matrix** on the [iQIES Help page](#) or on the [QIES Technical Support Website \(QTSO\)](#) for additional information on user role permissions.
- An email will arrive from [http://donotreply.HARP@hcqis.org](mailto: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. CLIA Billing Admin

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- 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 State User Role*.



*Figure 15: Request a User Role*

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

**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

**Federal Agency**  
Federal Agency roles

**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.

**Next**  **Cancel**

**Figure 16: Select a User Category**

4.4 Select **CMS**. 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.

**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

**iQAN Admin**  
For authorized iQAN administrators, access and manage all iQAN functionality per provider type.

**iQAN Provider Type Admin**  
Choose this option to select a provider type -specific iQAN Admin role (e.g. 'iQAN Nursing Home (NH) Admin')

**iQAN Provider Type User**  
Choose this option to select a provider type -specific iQAN User role (e.g. 'iQAN Nursing Home (NH) User')

**CLIA Billing Lead Admin**  
Authorized CLIA administrators can access the CLIA admin portal and accounting functionality.

**CLIA Data Exchange User**  
Choose this option to select a CLIA Data Exchange role

**iQAN Service Desk**  
Authorized CMS support personnel can access iQAN with additional permissions.

**Active Provider File Role**  
Authorized personnel can generate and access Active Provider File

**CLIA Billing User**  
Allow CMS users access to the CLIA Accounting system

**CLIA Billing Admin**  
Allow CMS users with admin privileges access to the CLIA Accounting system

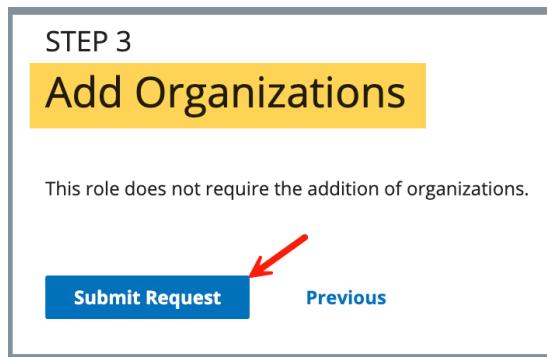
**CLIA Billing Super User (Restricted)**  
Restricted advanced permissions to the CLIA Accounting system

**Next**  **Previous**

**Figure 17: Select a User Role**

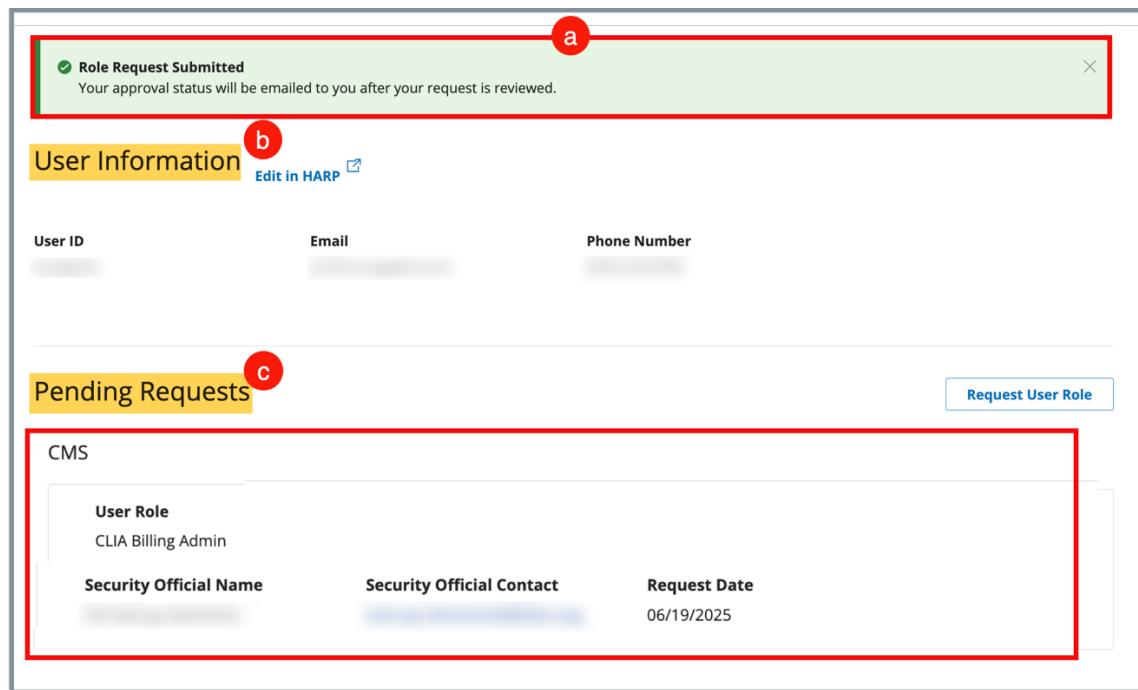
**4.5 Select CLIA Billing Admin.**

**4.6 Click Next. The Add Organizations window opens. See Figure 18, Add Organizations.**



*Figure 18: Add Organizations*

4.7 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 19, Role Request Submitted Notification Banner*.



*Figure 19: Role Request Submitted Notification*

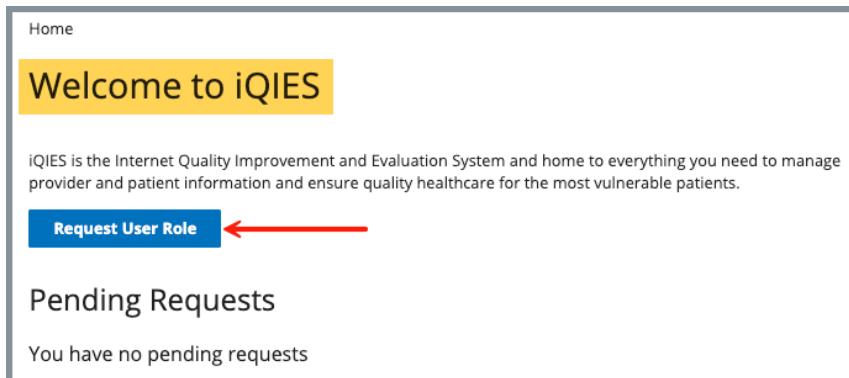
- a. Green successful submission notification banner.
- b. **User Information** section. This section can be edited in HARP. Click **Edit in HARP** and a new tab opens in HARP.
- c. **Pending Requests** section, which notes the user role requested, the Security Official (SO) name and contact information, 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](mailto: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.

## 5. CLIA Billing Contractor

- 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 20, Request a User Role*.



Home

## Welcome to iQIES

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.

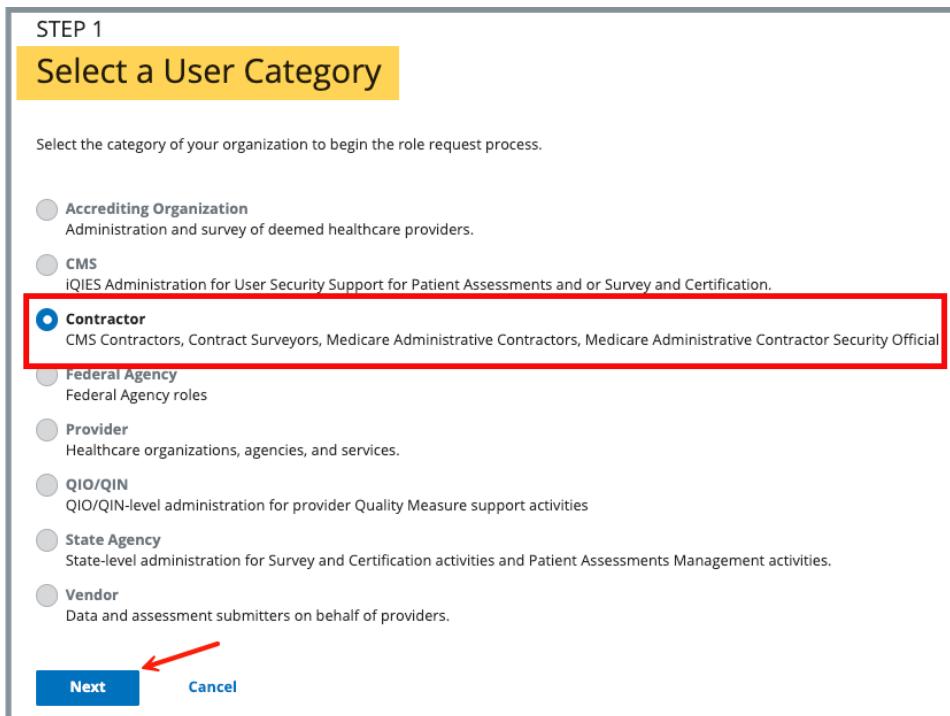
**Request User Role** ←

**Pending Requests**

You have no pending requests

*Figure 20: Request a User Role*

- 5.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 21, Select a User Category*.



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  

**Federal Agency**  
Federal Agency roles

**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.

**Next** ← **Cancel**

*Figure 21: Select a User Category*

5.4 Select **Contractor**. Click **Next**. The **Select a User Role** page opens. See *Figure 22, 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
- MAC S&C Provider Certification**  
This role allows Medicare Administrative Contractor (MAC) designated agents the access to process provider/supplier certification recommendations in iQIES.
- 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

[Next](#) [Previous](#)

*Figure 22: Select a User Role*

5.5 Select **CLIA Billing Contractor**.

5.6 Click **Next**. The **Add Organizations** window opens. See *Figure 23, Add Organizations*.

STEP 3

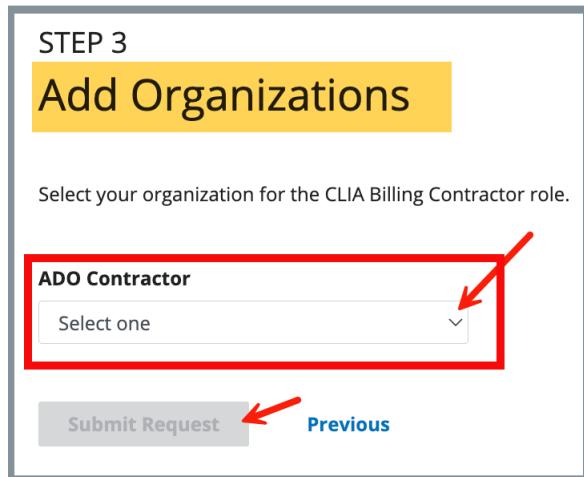
## Add Organizations

Select your organization for the CLIA Billing Contractor role.

**ADO Contractor**

Select one

**Submit Request** **Previous**



*Figure 23: Add Organizations*

5.7 Select a contractor from the **ADO Contractor** drop-down menu.

**Note:** **Submit Request** is disabled until a contractor is selected.

5.8 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 24, Role Request Submitted Notification*.

**a**

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

**b**

**User Information** [Edit in HARP](#)

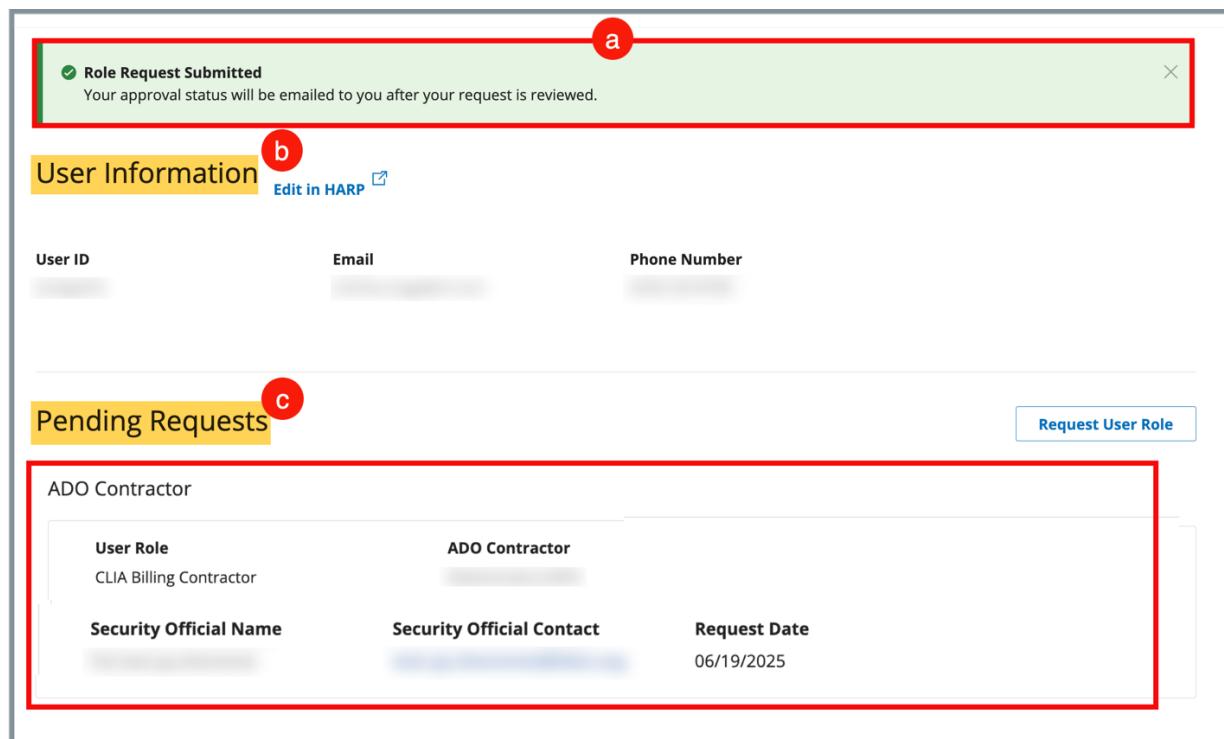
User ID Email Phone Number

**c**

**Pending Requests** [Request User Role](#)

**ADO Contractor**

User Role	ADO Contractor
CLIA Billing Contractor	
Security Official Name	Security Official Contact
	Request Date
	06/19/2025



*Figure 24: 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 ADO Contractor, the Security Official (SO) name and contact information, along with the user role request date.

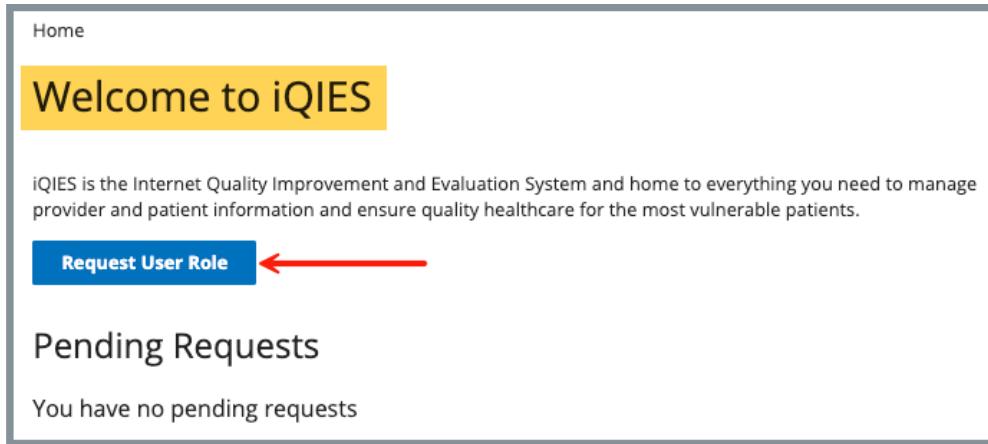
**Notes:**

- 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.

## 6. CLIA Billing User

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- 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 25, Request a User Role*.



*Figure 25: Request a User Role*

- 6.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 26, Select a User Category*.

**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

**Federal Agency**  
Federal Agency roles

**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.

**Next**  **Cancel**

*Figure 26: Select a User Category*

6.4 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 27, Select a 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

**iQAN Admin**  
For authorized iQAN administrators, access and manage all iQAN functionality per provider type.

**iQAN Provider Type Admin**  
Choose this option to select a provider type -specific iQAN Admin role (e.g. 'iQAN Nursing Home (NH) Admin')

**iQAN Provider Type User**  
Choose this option to select a provider type -specific iQAN User role (e.g. 'iQAN Nursing Home (NH) User')

**CLIA Billing Lead Admin**  
Authorized CLIA administrators can access the CLIA admin portal and accounting functionality.

**CLIA Data Exchange User**  
Choose this option to select a CLIA Data Exchange role

**iQAN Service Desk**  
Authorized CMS support personnel can access iQAN with additional permissions.

**Active Provider File Role**  
Authorized personnel can generate and access Active Provider File

**CLIA Billing User**  
Allow CMS users access to the CLIA Accounting system

**CLIA Billing Admin**  
Allow CMS users with admin privileges access to the CLIA Accounting system

**CLIA Billing Super User (Restricted)**  
Restricted advanced permissions to the CLIA Accounting system

**Next**  **Previous**

**Figure 27: Select a User Role**

**6.5 Select CLIA Billing User.**

**6.6 Click Next. The Add Organizations window opens. See *Figure 28, Add Organizations*.**

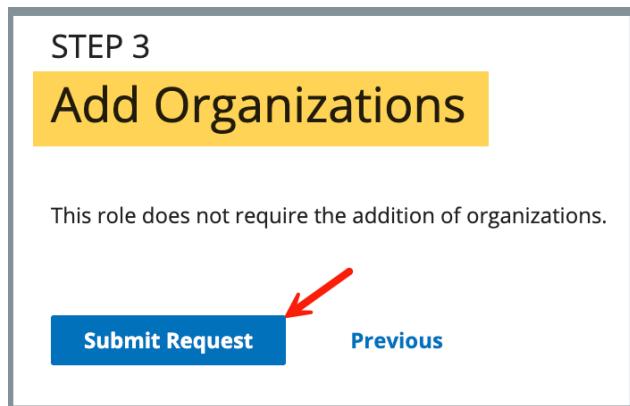


Figure 28: Add Organizations

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 29, Role Request Submitted Notification*.

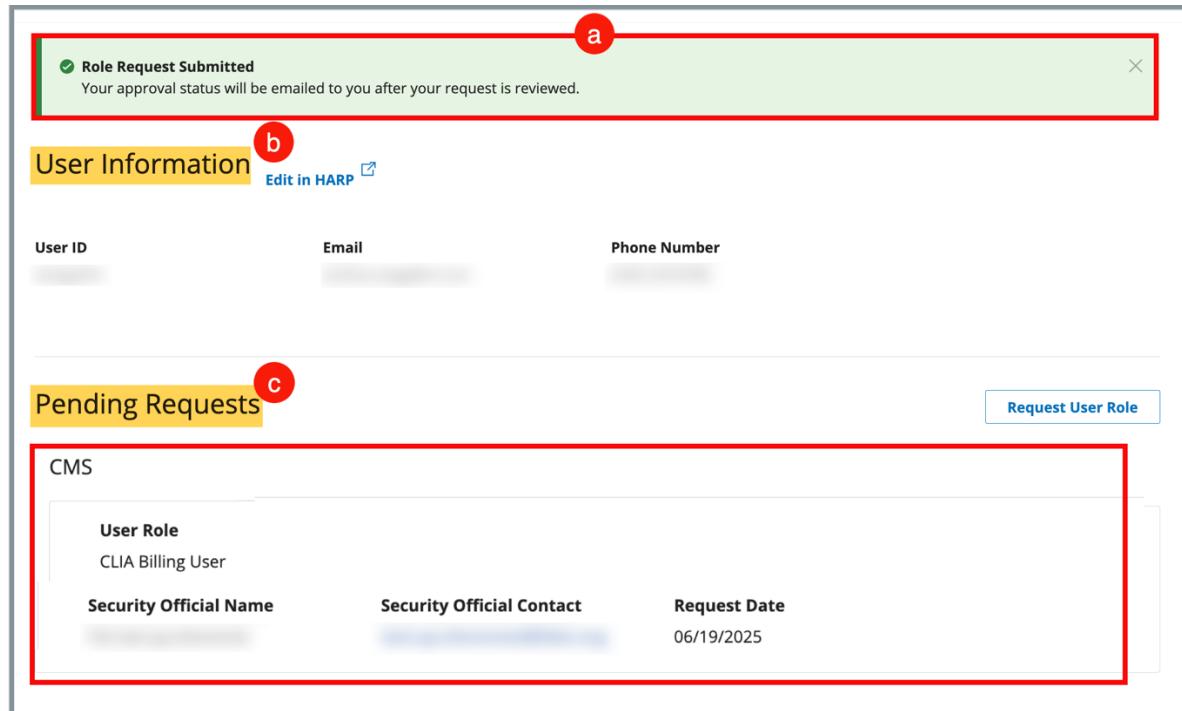


Figure 29: Role Request Submitted Notification

- 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.

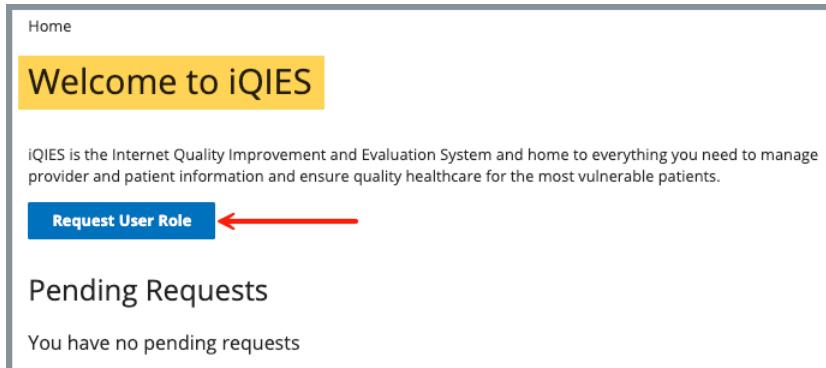
- c. **Pending Requests** section, which notes the user role requested, the Security Official (SO) name and contact information, along with the user role request date.

**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. State Agency - CLIA Billing 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 30, Request a User Role*.



Home

## Welcome to iQIES

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.

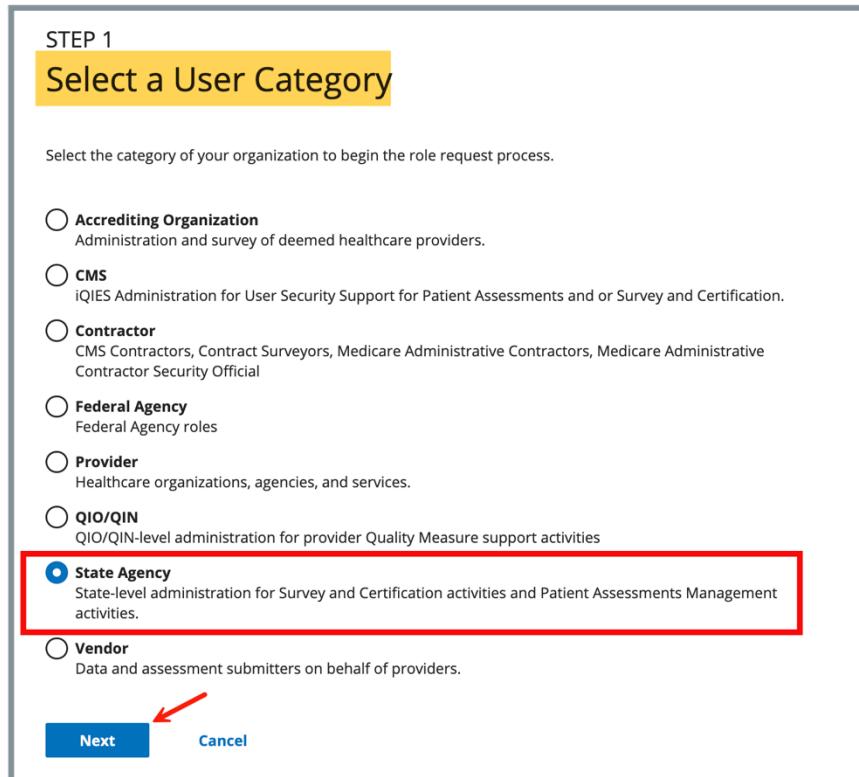
**Request User Role** 

**Pending Requests**

You have no pending requests

*Figure 30: Request a User Role*

- 7.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 31, Select a User Category*.



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
- Federal Agency**  
Federal Agency roles
- 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.

**Next**  **Cancel**

*Figure 31: Select a User Category*

7.4 Select **State Agency**. Click **Next**. The **Select a User Role** page opens. See *Figure 32, 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

**State Agency - iQAN CLIA User**  
Allow state agency users access to the iQAN email notification system within iQIES

**State Agency - CLIA Billing User**  
Allow state agency users access to the CLIA Accounting system

[Next](#) [Previous](#)

*Figure 32: Select a User Role*

7.5 Select **State Agency – CLIA Billing User**.

7.6 Click **Next**. The **Add Organizations** window opens. See *Figure 33, Add Organizations*.

STEP 3

## Add Organizations

Enter the state for your organization.

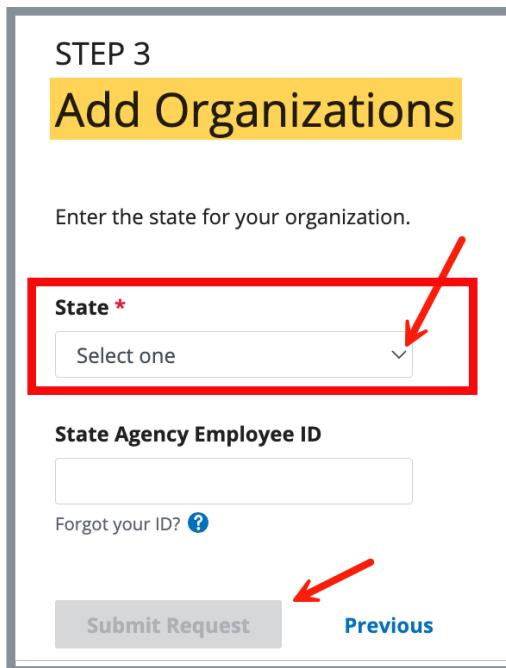
**State \***

Select one

State Agency Employee ID

Forgot your ID? [?](#)

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

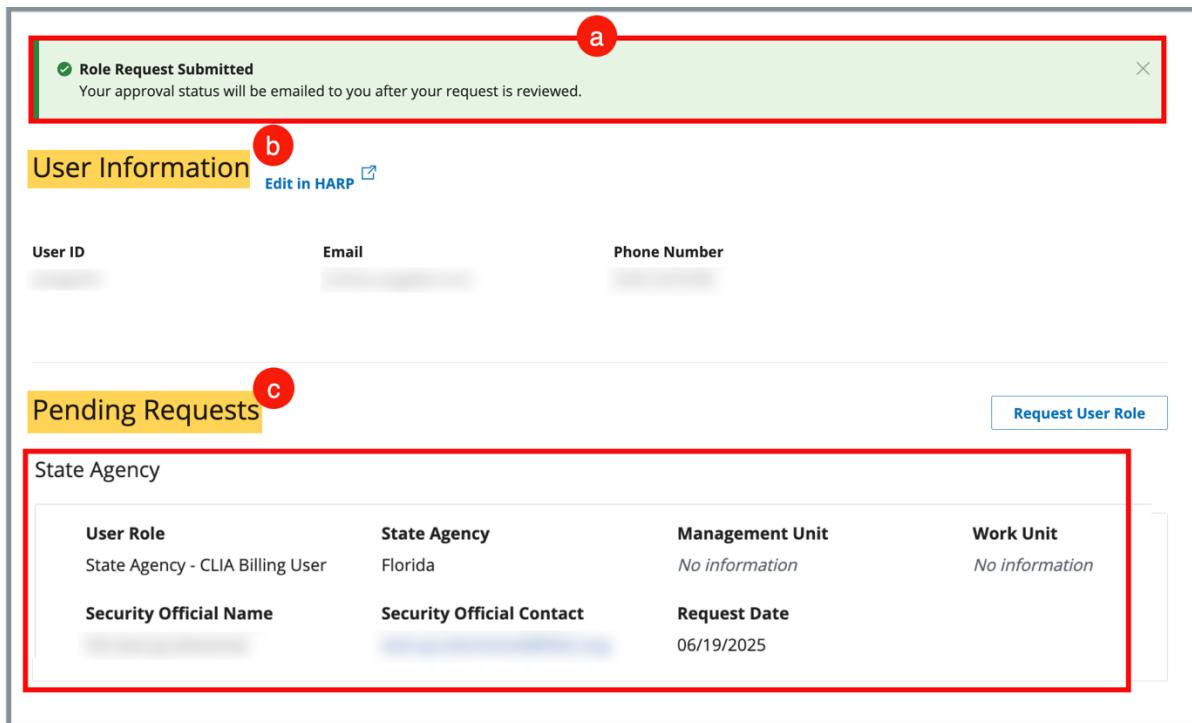


*Figure 33: Add Organizations*

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

**Note:** **Submit Request** is disabled until a state is selected.

7.8 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 34, Role Request Submitted Notification*.



**Figure 34: 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 State Agency, Management and Work Units, 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](mailto: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.