



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

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

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 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.

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 *

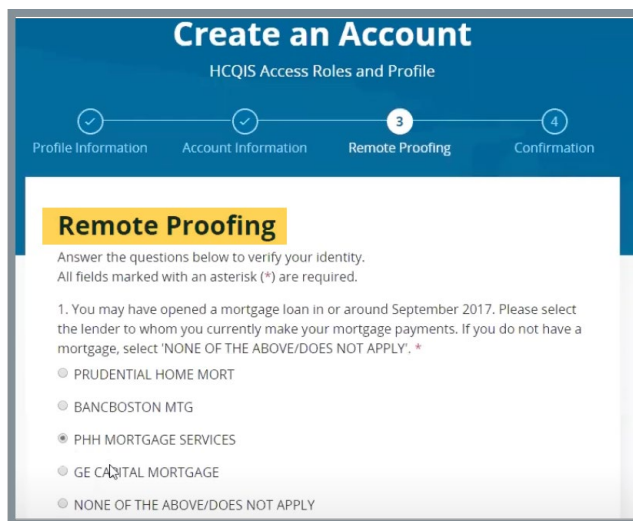
Challenge Answer must be at least 4 characters and cannot contain the challenge question, user ID, or password.

← Back Next →

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.

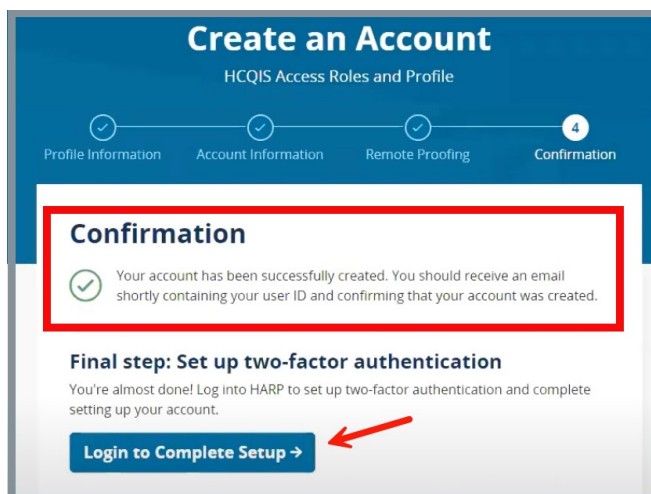


The screenshot shows the 'Create an Account' page for HCQIS Access Roles and Profile. It features a progress bar at the top with four steps: Profile Information, Account Information, Remote Proofing (current step, marked with a '3'), and Confirmation (marked with a '4'). The main content area is titled 'Remote Proofing' and contains instructions: '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, now at Step 4: Confirmation. The progress bar at the top shows the first three steps completed and the fourth step, Confirmation, as the current step (marked with a '4'). The main content area is titled 'Confirmation' and features a green checkmark icon followed by the 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*.

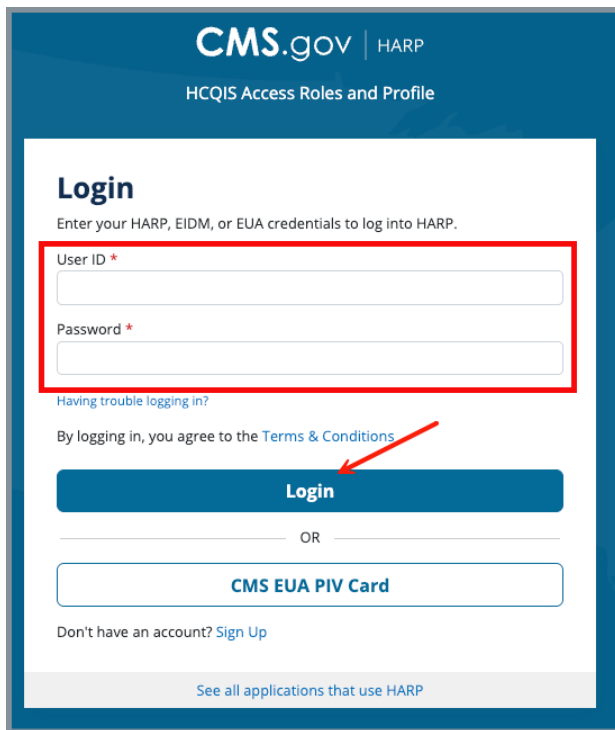


Figure 5: HARP Login Page

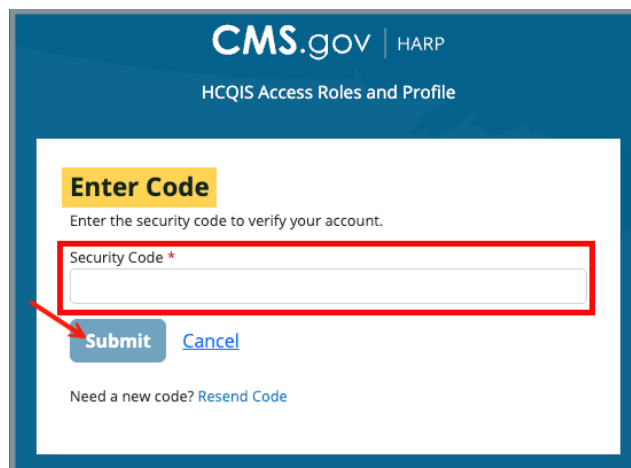
- 2.10 Set up two-factor authentication. See *Figure 6, Set Up Two-Factor Authentication*.



Figure 6: Set Up Two-Factor Authentication

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

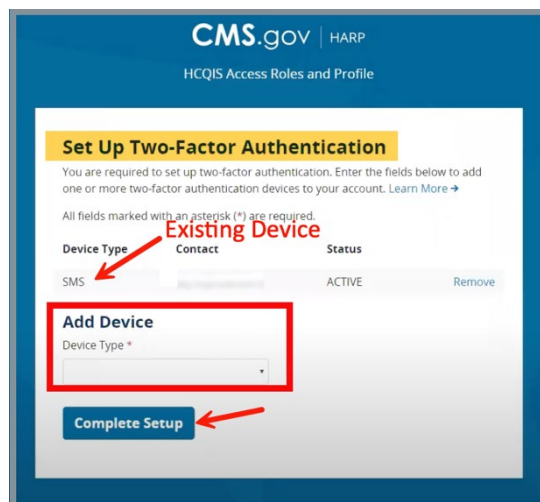
- d. Type the security code. See *Figure 7, Security Code*.



The screenshot shows the CMS.gov HARP interface for 'HCQIS Access Roles and Profile'. Under the 'Enter Code' heading, it instructs the user to 'Enter the security code to verify your account.' A text input field labeled 'Security Code *' is highlighted with a red rectangle. Below the field are 'Submit' and 'Cancel' buttons. A red arrow points from the 'Submit' button to the left. At the bottom, there is a link: '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*.



The screenshot shows the 'Set Up Two-Factor Authentication' section. It states: '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 this, it says: '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 from the text 'Existing Device' above the table. The status is 'ACTIVE', and there is a 'Remove' link. Below the table is the 'Add Device' section, which has a 'Device Type *' dropdown menu highlighted with a red rectangle. At the bottom is a 'Complete Setup' button with a red arrow pointing to it.

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*.

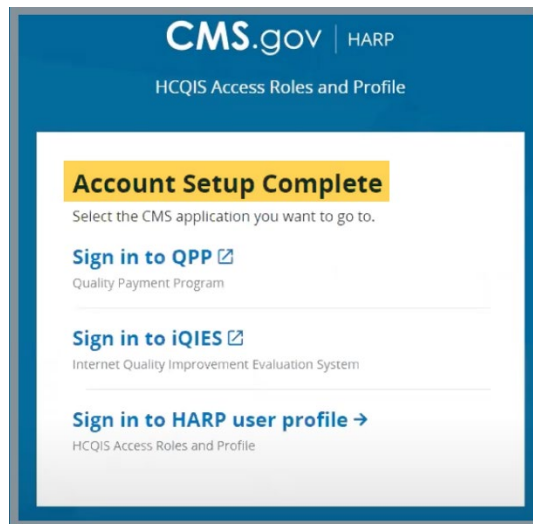


Figure 9: Account Setup Complete

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

- 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*.

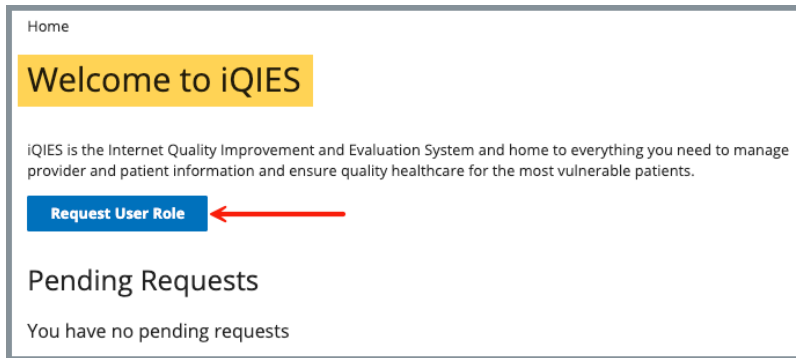


Figure 10: Welcome to iQIES

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.

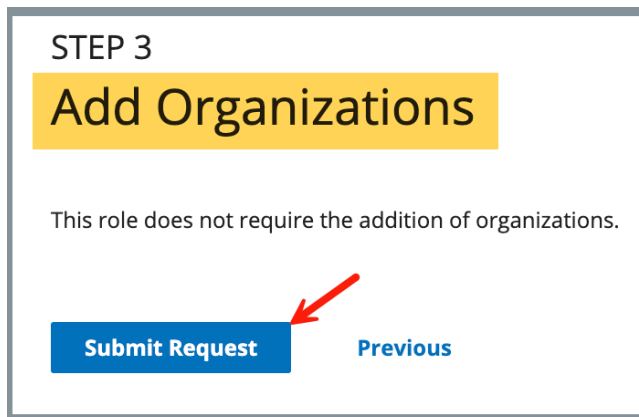
- ☐ **CMS View Only User**
View patient profiles, view assessments, generate and view reports.
- ☐ **CMS General User**
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.
- ☐ **iQIES Help Desk**
iQIES system support.
- ☐ **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

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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*.



STEP 3

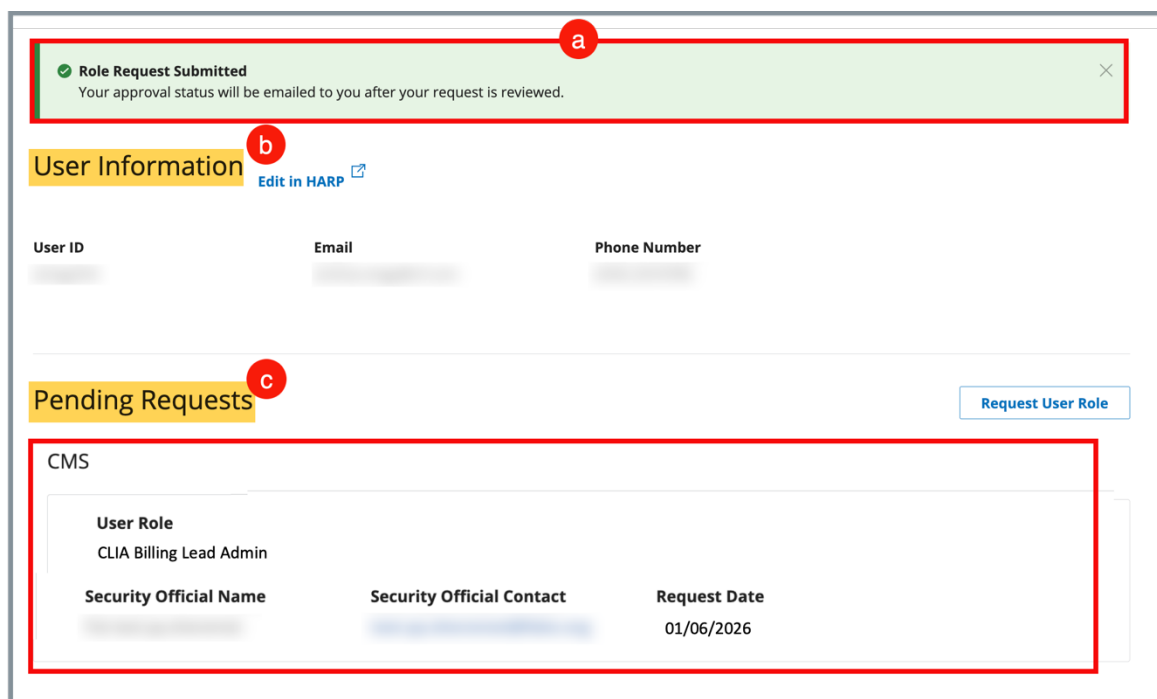
Add Organizations

This role does not require the addition of organizations.

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

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*.



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](#)

CMS

User Role	Security Official Name	Security Official Contact	Request Date
CLIA Billing Lead Admin			01/06/2026

Figure 14: 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.
- 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> 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

- 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*.

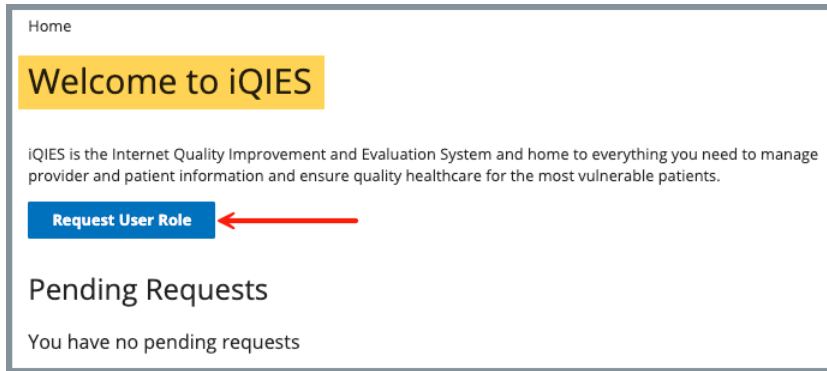


Figure 15: Request a User Role

- 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

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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*.

STEP 3

Add Organizations

This role does not require the addition of organizations.

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

A red arrow points to the 'Submit Request' button.

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*.

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](#)

CMS		
User Role	Security Official Name	Security Official Contact
CLIA Billing Admin		
Request Date	06/19/2025	

Figure 19: 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 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*.

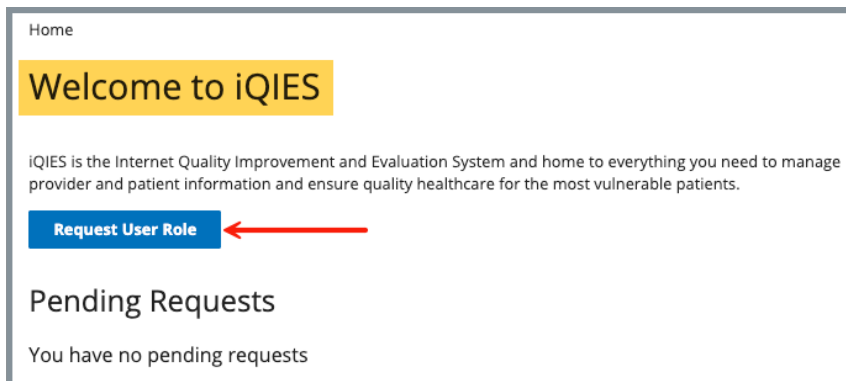


Figure 20: Request a User Role

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

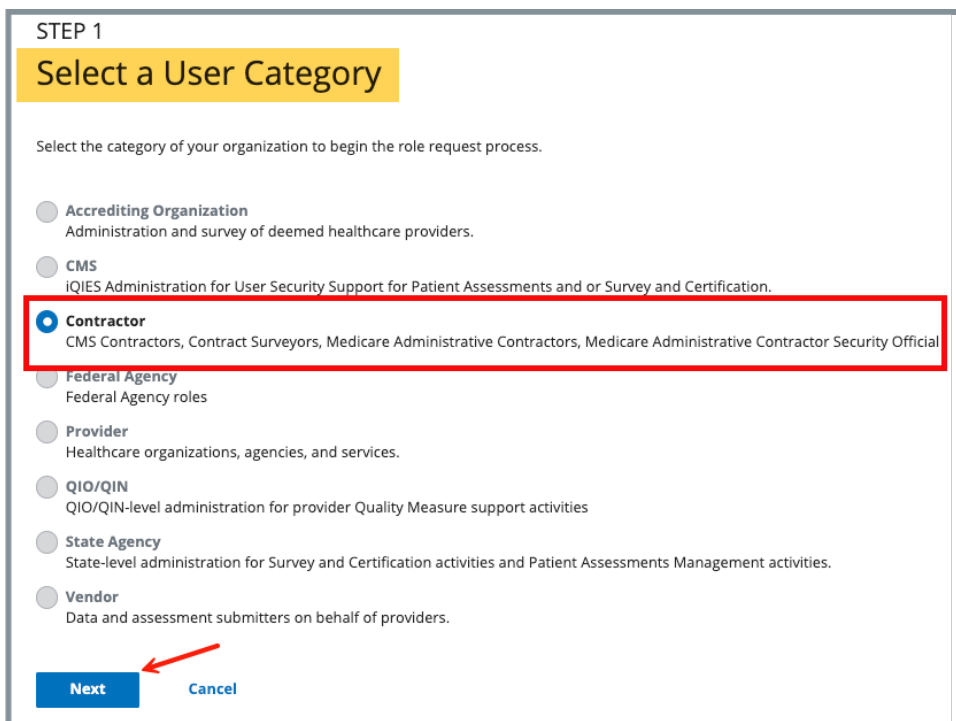


Figure 21: Select a User Category

- 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

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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*.

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](#)

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](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.

6. CLIA Billing User

- 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*.

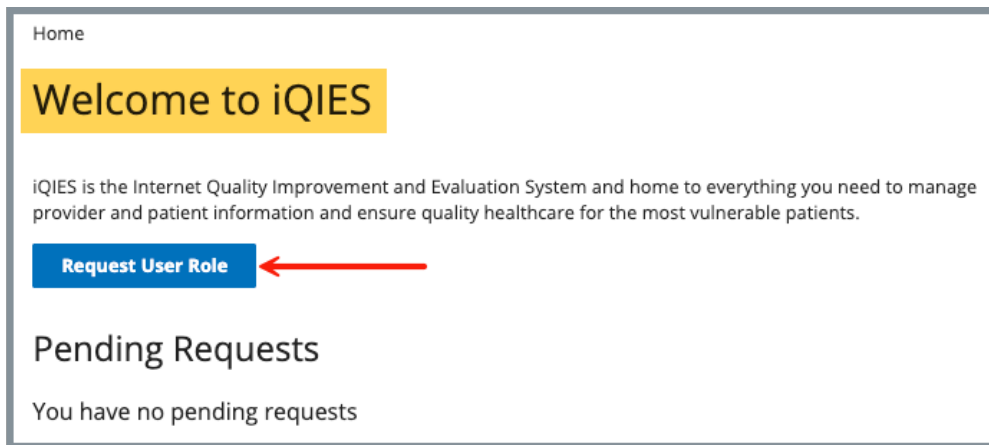


Figure 25: Request a User Role

- 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.
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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

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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*.

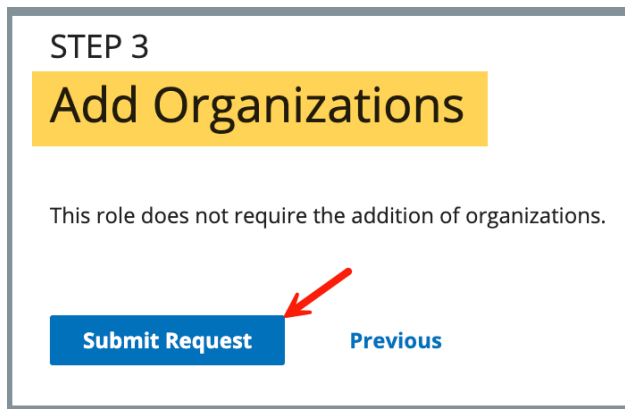


Figure 28: Add Organizations

- 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*.

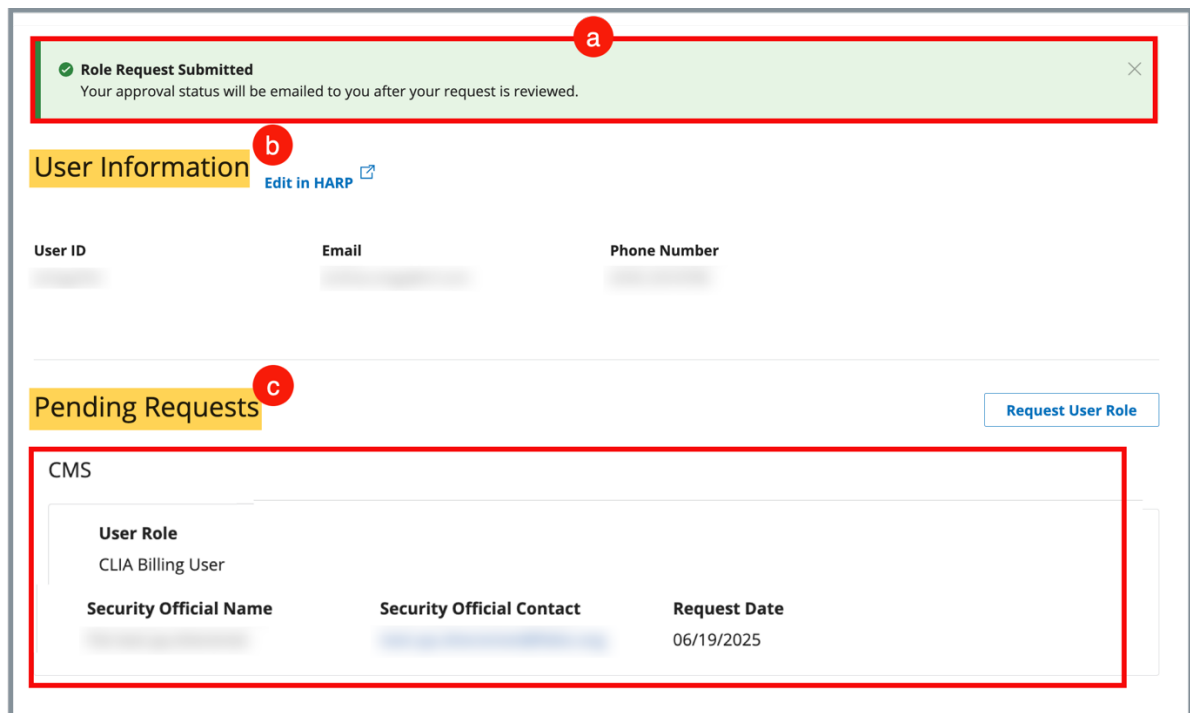


Figure 29: Role Request Submitted Notification

- 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@hcgis.org](mailto:donotreply.HARP@hcgis.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*.

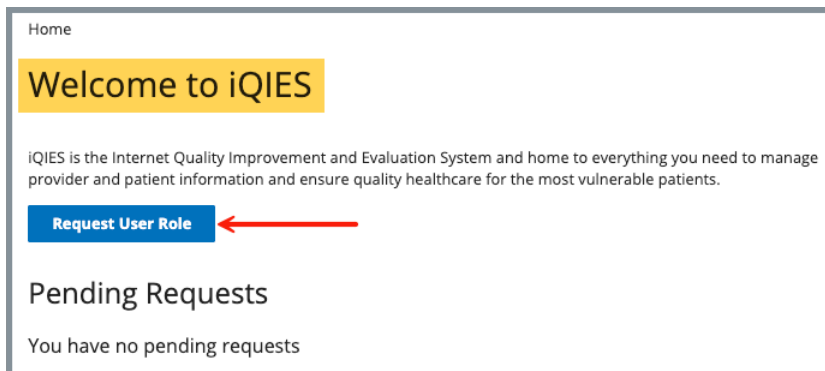


Figure 30: Request a User Role

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

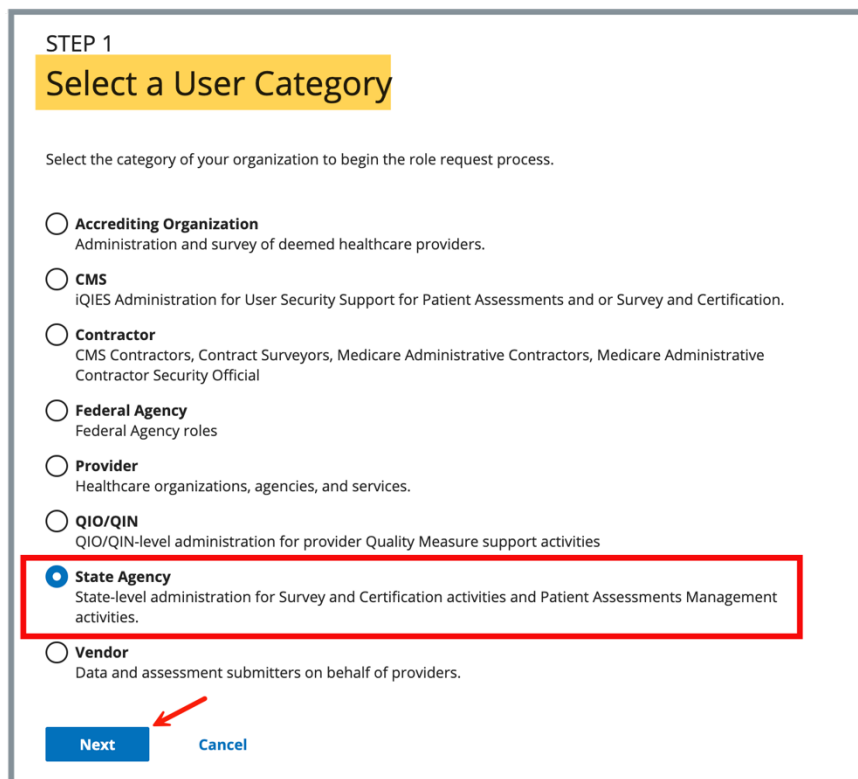


Figure 31: Select a User Category

- 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*.

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](#)

User Role	State Agency	Management Unit	Work Unit
State Agency - CLIA Billing User	Florida	No information	No information
Security Official Name	Security Official Contact	Request Date	
		06/19/2025	

Figure 34: 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 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@hcgis.org> noting whether the role was approved or rejected. Contact [the iQIES Service Center](#) if no email is received within several days.