



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

CLIA 116 CMS Admin

CLIA Assistant User

CLIA Assistant Admin

CLIA 116 CMS Full Access

CLIA Proficiency Testing Admin

CLIA 116 State Data Liaison

CLIA 116 State Approver

Job Aid

Version 2.0

October 6, 2026

1. Introduction

This job aid outlines the steps the CLIA Billing Lead Admin, CLIA Billing Admin, CLIA Billing Contractor, CLIA Billing User, State Agency – CLIA Billing User, CLIA 116 CMS Admin, CLIA Assistant User, CLIA Assistant Admin, CLIA 116 CMS Full Access, CLIA Proficiency Testing Admin, CLIA 116 state Data Liaison, and CLIA 116 State Approver roles need to access iQIES either for production or for the training environment.

- 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 [Training Environment](#) or to [Production](#) 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*.

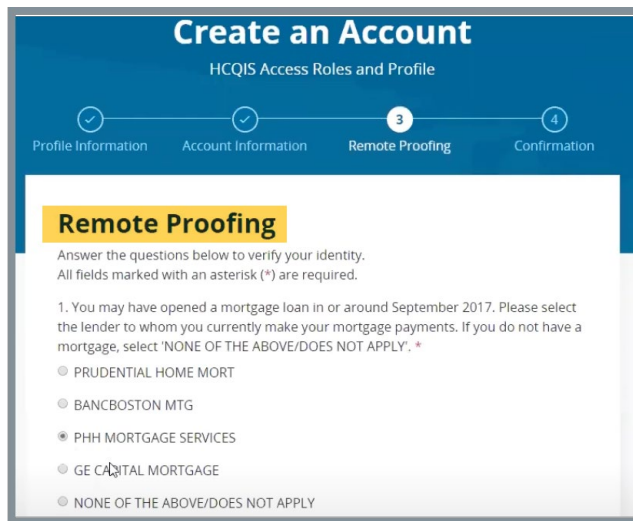
Note: **Next** is disabled until all the information is completed.

The screenshot shows the 'Account Information' page, which is the second step in a three-step onboarding process. The top navigation bar has three tabs: 'Profile Information' (marked with a checkmark), 'Account Information' (marked with a '2'), and 'Confirmation' (marked with a '3'). The main content area is titled 'Account Information' in a yellow box. Below the title, it says 'Create your user ID, password, and challenge question. All fields marked with an asterisk (*) are required.' The form fields are: 'User ID *' (text input), 'Password *' (text input with a toggle icon), 'Confirm Password *' (text input with a toggle icon), 'Challenge Question *' (dropdown menu), and 'Challenge Answer *' (text input). A red box highlights the 'User ID', 'Password', 'Confirm Password', 'Challenge Question', and 'Challenge Answer' fields. Below the 'Password' and 'Confirm Password' fields, there are four red error messages: 'At least 15 characters', 'Include a lowercase letter', 'Include an uppercase letter', and 'Include a number (0-9)'. Below the 'Challenge Question' field, there is a note: 'Cannot contain first name, last name, or part of user ID'. Below the 'Challenge Answer' field, there is a note: 'Challenge Answer must be at least 4 characters and cannot contain the challenge question, user ID, or password.' At the bottom of the form, there are two buttons: 'Back' and 'Next'. A red arrow points to the 'Next' button.

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.

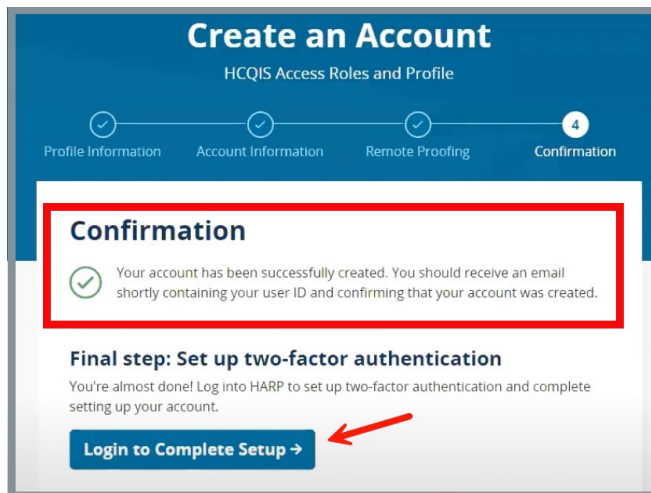


The screenshot shows the 'Create an Account' page for HCQIS Access Roles and Profile. It features a progress bar at the top with four steps: Profile Information, Account Information, Remote Proofing (current step, marked with a '3'), and Confirmation (marked with a '4'). The main content area is titled '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*.

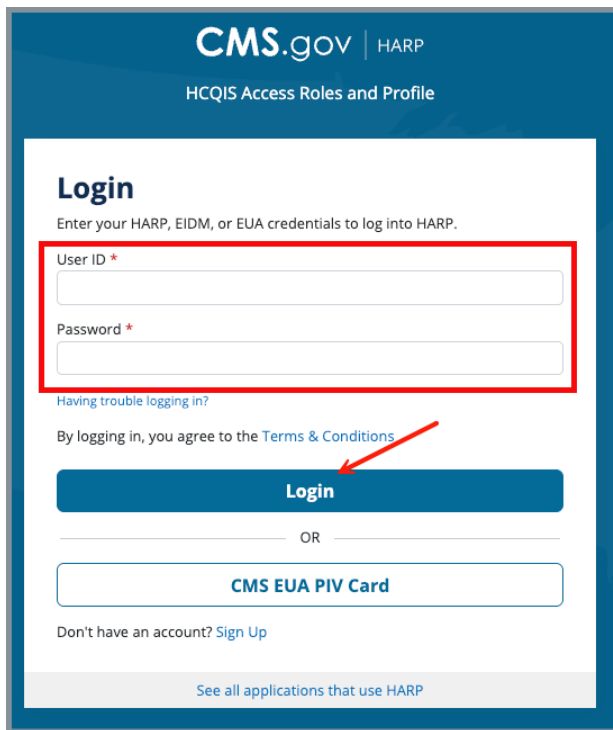
Note: An automated email is sent confirming user ID and account creation.



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 Step 4 (Confirmation) as the current step. The main content area is titled 'Confirmation' and contains 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 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*.



CMS.gov | HARP
HCQIS Access Roles and Profile

Login

Enter your HARP, EIDM, or EUA credentials to log into HARP.

User ID *

Password *

[Having trouble logging in?](#)

By logging in, you agree to the [Terms & Conditions](#)

Login

OR

CMS EUA PIV Card

Don't have an account? [Sign Up](#)

[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*.



CMS.gov | HARP
HCQIS Access Roles and Profile

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.

Add Device

Device Type *

Send Code

[Learn More](#)

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.

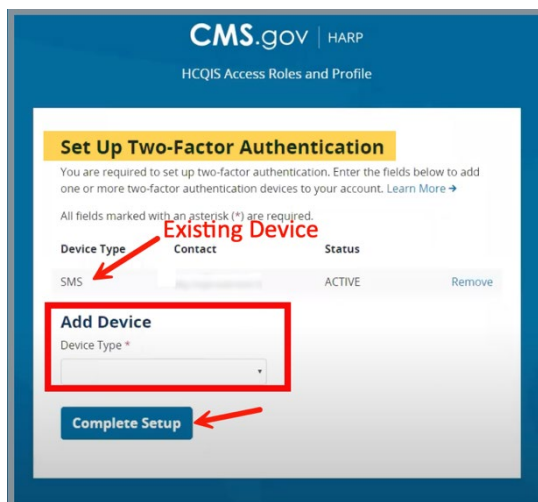
- d. Type the security code. See *Figure 7, Security Code*.



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, a contact field, and 'ACTIVE' status, with a 'Remove' link. Below the table is the 'Add Device' section, which has a 'Device Type *' dropdown menu highlighted with a red box. At the bottom is a 'Complete Setup' button with a red arrow pointing to it. A red arrow also points from the 'Existing Device' text to the table.

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*.

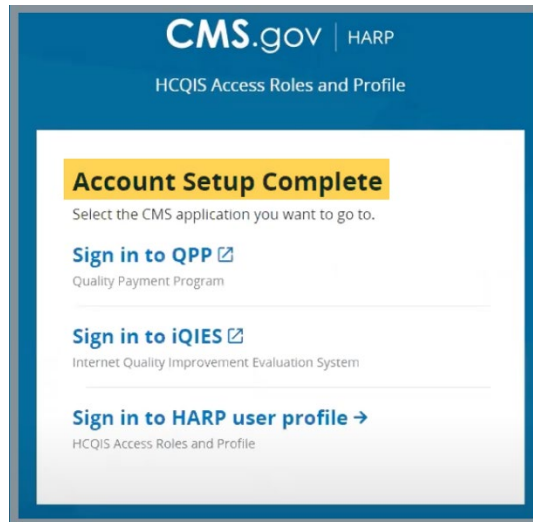


Figure 9: Account Setup Complete

Note: **Sign in to iQIES** opens the production environment. Go to <https://training-iqies.cms.gov/> to log into the training 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](#)
 - [CLIA 116 CMS Admin](#)
 - [CLIA Assistant User](#)
 - [CLIA Assistant Admin](#)
 - [CLIA 116 CMS Full Access](#)
 - [CLIA Proficiency Testing Admin](#)
 - [CLIA 116 State Data Liaison](#)
 - [CLIA 116 State Approver](#)

3. CLIA Billing Lead Admin

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

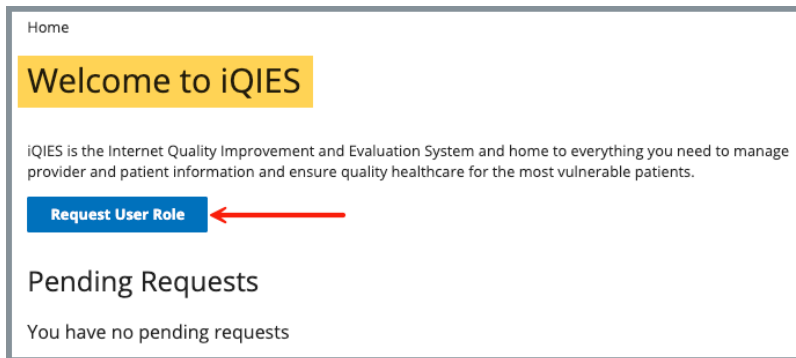


Figure 10: Welcome to iQIES

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 CLIA Billing Lead Admin		
Security Official Name	Security Official Contact	Request Date 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 the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. The **Welcome to iQIES** page opens. See *Figure 15, Request a State User Role*.

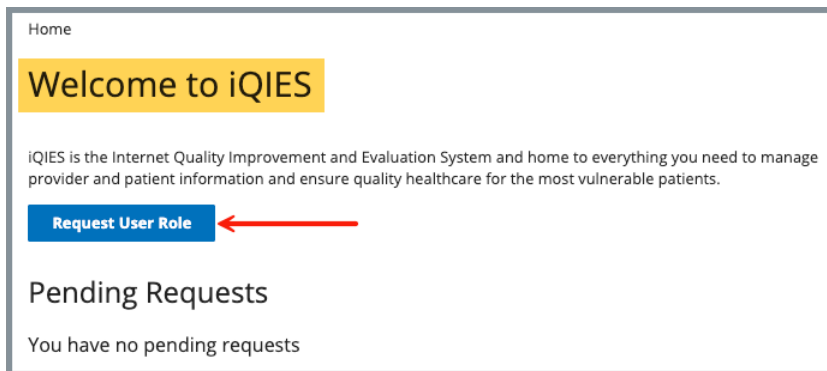


Figure 15: Request a User Role

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

Figure 16: Select a User Category

- 4.3 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

- 4.4 Select **CLIA Billing Admin**.
- 4.5 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](#)

Figure 18: Add Organizations

- 4.6 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	Request Date
CLIA Billing Admin			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 the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. The **Welcome to iQIES** page opens. See *Figure 20, Request a User Role*.

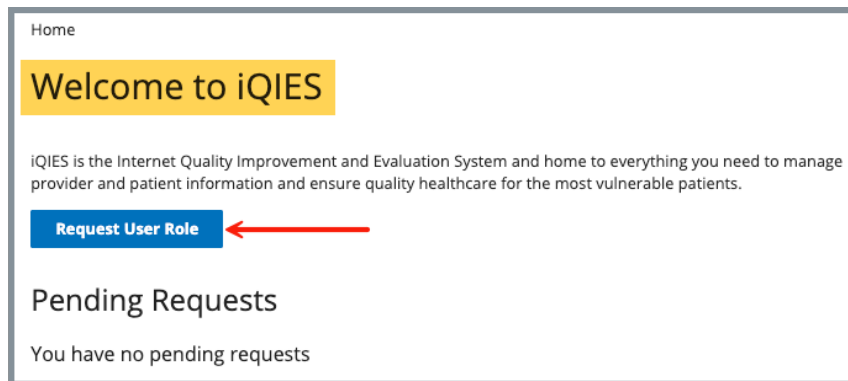


Figure 20: Request a User Role

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

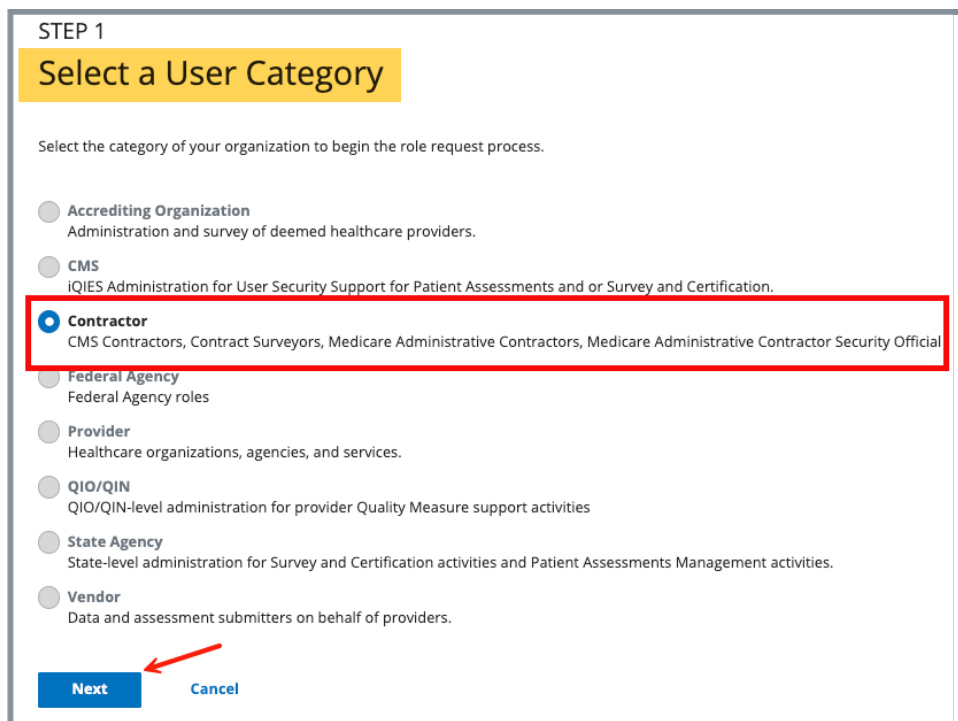


Figure 21: Select a User Category

- 5.3 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

5.4 Select **CLIA Billing Contractor**.

5.5 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

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

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

- 5.7 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 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 the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. The **Welcome to iQIES** page opens. See *Figure 25, Request a User Role*.

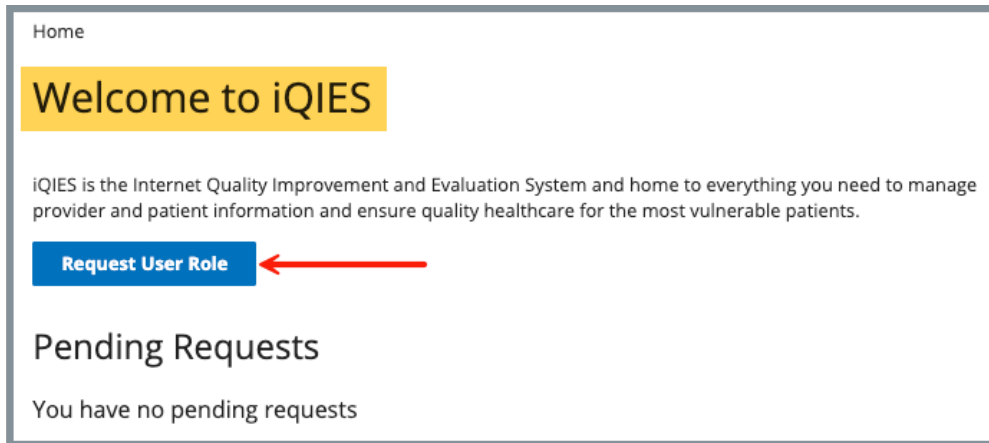


Figure 25: Request a User Role

- 6.2 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

- 6.3 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.

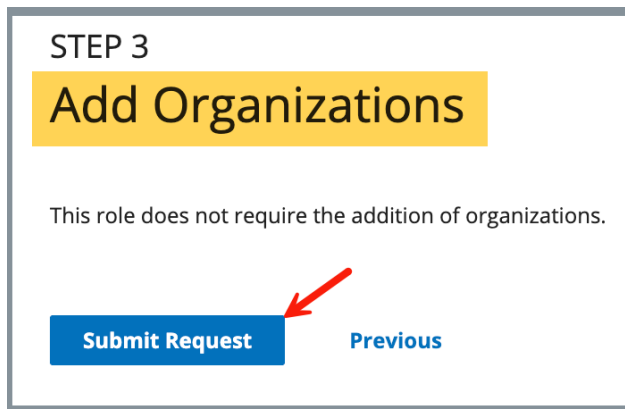
- ☐ **CMS View Only User**
View patient profiles, view assessments, generate and view reports.
- ☐ **CMS General User**
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.
- ☐ **iQIES Help Desk**
iQIES system support.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

6.4 Select **CLIA Billing User**.

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



STEP 3

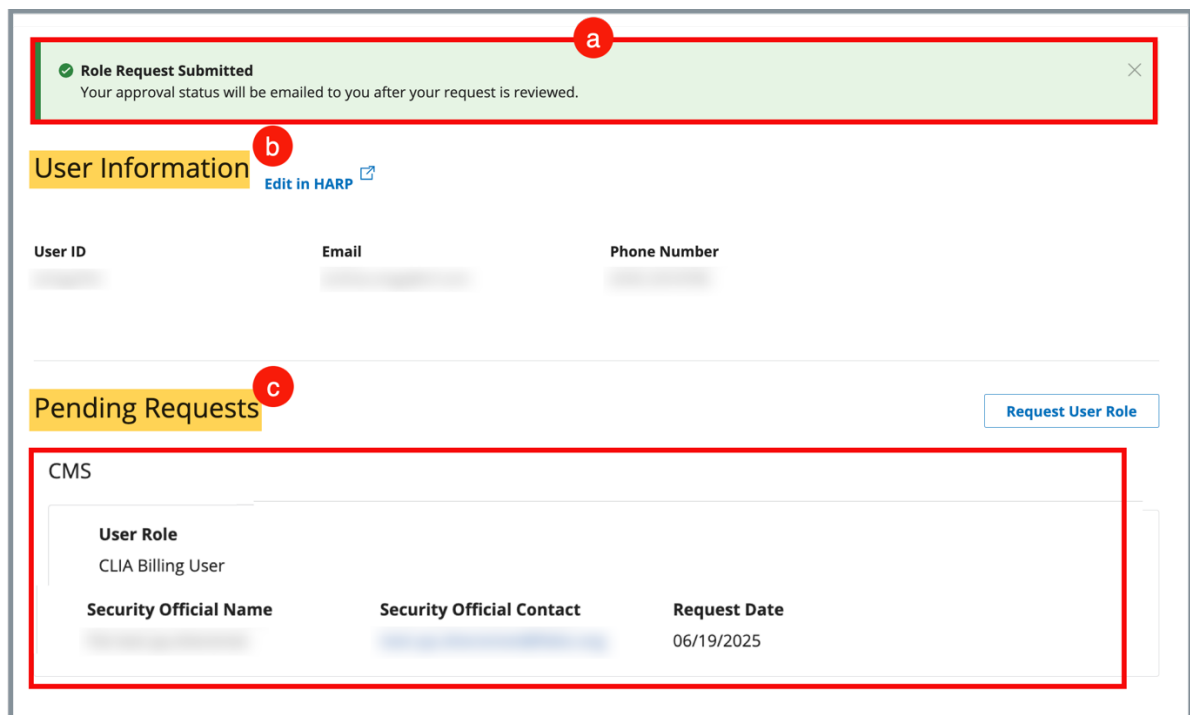
Add Organizations

This role does not require the addition of organizations.

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

Figure 28: Add Organizations

- 6.6 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*.



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 CLIA Billing User	Security Official Name	Security Official Contact	Request Date 06/19/2025
---------------------------------------	-------------------------------	----------------------------------	-----------------------------------

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@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 the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. The **Welcome to iQIES** page opens. See *Figure 30, Request a User Role*.

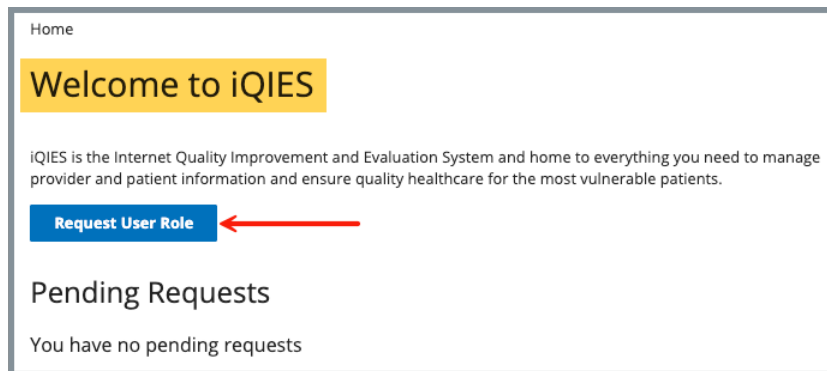


Figure 30: Request a User Role

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

Figure 31: Select a User Category

- 7.3 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

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

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

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

- 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 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
CLIA_Usei

Email

Phone Number

Pending Requests [Request User Role](#)

User Role	Security Official Name	Security Official Contact	Request Date
CLIA 116 CMS Admin			10/01/2026

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.

8. CLIA 116 CMS Admin

- 8.1 Log in to the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. Refer to [Create an Account in HARP](#) for further information, if necessary. The Welcome to iQIES page opens. See *Figure 35, Welcome to iQIES*.

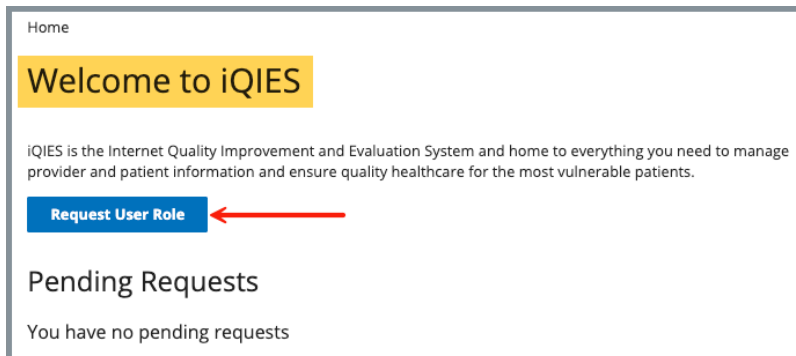


Figure 35: Welcome to iQIES

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.

- 8.2 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 36, 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 36: Select a User Category

- 8.3 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 37, 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
- ☒ **CLIA 116 CMS Admin**
Admin Access to CLIA Demographics and Lab Intake
- ☐ **CLIA Assistant User**
Access to use the CLIA Assistant
- ☐ **CLIA Assistant Admin**
Admin access to use CLIA Assistant and manage CLIA Assistant documents and feedback
- ☐ **CLIA 116 CMS Full Access**
CMS users who author and review CLIA 116 applications nationally and may change a lab classification.
- ☐ **CLIA Proficiency Testing Admin**
CMS users who maintain CLIA proficiency testing programs and analytes, upload and cancel result files, and export proficiency testing data.

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

Figure 37: Select a User Role

8.4 Select **CLIA 116 CMS Admin**.

8.5 Click **Next**. The **Add Organizations** window opens. See *Figure 38, Add Organizations*.

STEP 3

Add Organizations

This role does not require the addition of organizations.

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

Figure 38: Add Organizations

- 8.6 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 39, 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: CLIA_User
Email:
Phone Number:

Pending Requests [Request User Role](#)

User Role	Security Official Name	Security Official Contact	Request Date
CLIA 116 CMS Admin			10/01/2026

Figure 39: 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.
- 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.

9. CLIA Assistant User

- 9.1 Log in to the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. Refer to [Create an Account in HARP](#) for further information, if necessary. The Welcome to iQIES page opens. See *Figure 40, Welcome to iQIES*.

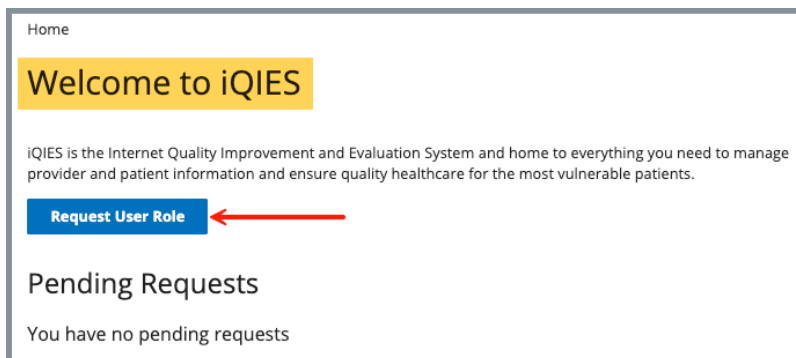


Figure 40: Welcome to iQIES

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.

- 9.2 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 41, 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 41: Select a User Category

- 9.3 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 42, Select a User Role*.

STEP 2
Select a User Role

Select the user role that best fits your needs.

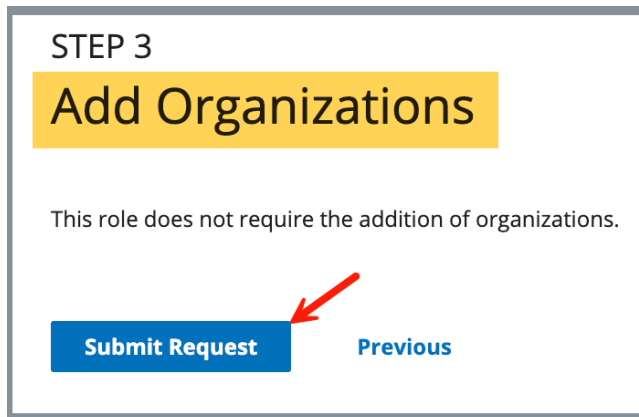
- ☐ **CMS View Only User**
View patient profiles, view assessments, generate and view reports.
- ☐ **CMS General User**
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.
- ☐ **iQIES Help Desk**
iQIES system support.
- ☐ **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
- ☐ **CLIA 116 CMS Admin**
Admin Access to CLIA Demographics and Lab Intake
- ☒ **CLIA Assistant User**
Access to use the CLIA Assistant
- ☐ **CLIA Assistant Admin**
Admin access to use CLIA Assistant and manage CLIA Assistant documents and feedback
- ☐ **CLIA 116 CMS Full Access**
CMS users who author and review CLIA 116 applications nationally and may change a lab classification.
- ☐ **CLIA Proficiency Testing Admin**
CMS users who maintain CLIA proficiency testing programs and analytes, upload and cancel result files, and export proficiency testing data.

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

Figure 42: Select a User Role

9.4 Select **CLIA Assistant User**.

- 9.5 Click **Next**. The **Add Organizations** window opens. See *Figure 43, Add Organizations*.



STEP 3

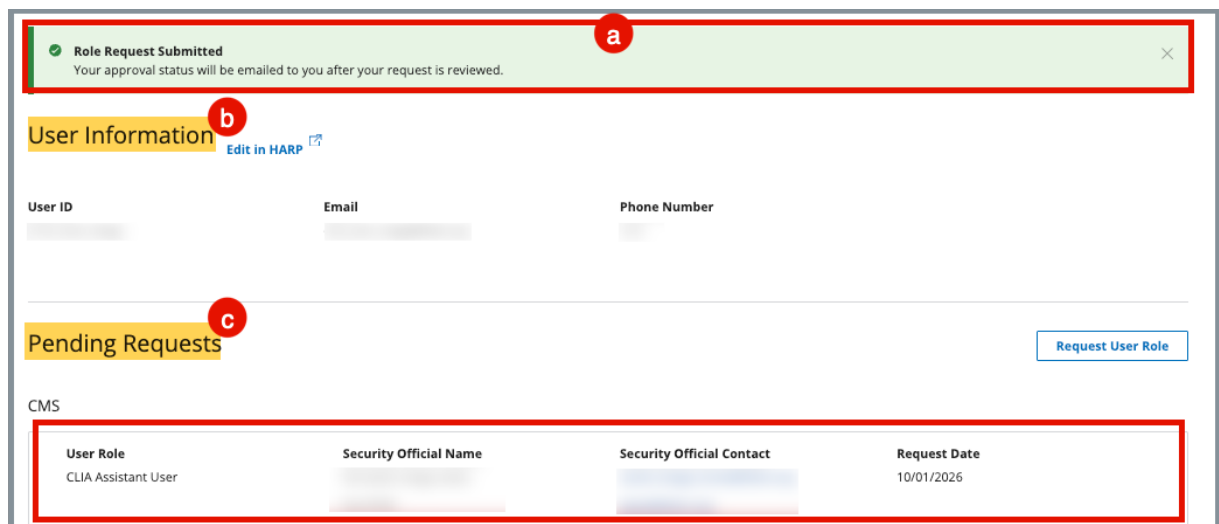
Add Organizations

This role does not require the addition of organizations.

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

Figure 43: Add Organizations

- 9.6 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 44, 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: [Redacted] Email: [Redacted] Phone Number: [Redacted]

Pending Requests

[Request User Role](#)

User Role	Security Official Name	Security Official Contact	Request Date
CLIA Assistant User	[Redacted]	[Redacted]	10/01/2026

Figure 44: 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.

10. CLIA Assistant Admin

- 10.1 Log in to the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. Refer to [Create an Account in HARP](#) for further information, if necessary. The Welcome to iQIES page opens. See *Figure 45, Welcome to iQIES*.

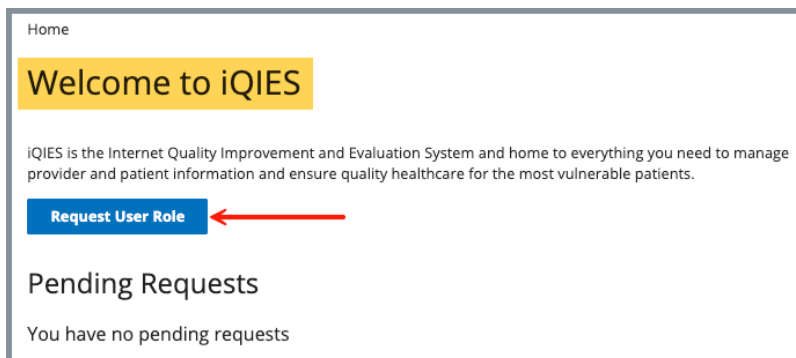


Figure 45: Welcome to iQIES

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.

- 10.2 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 46, 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 46: Select a User Category

- 10.3 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 47, Select a User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

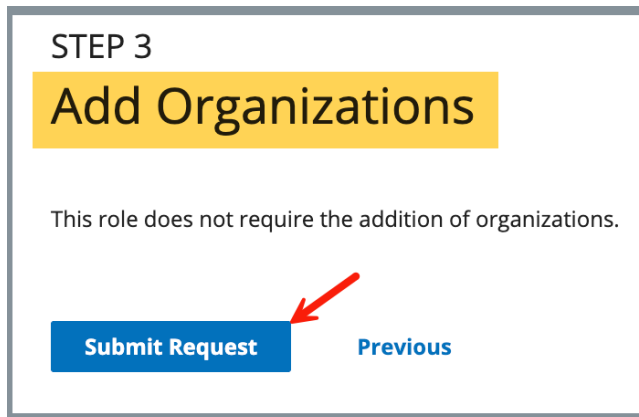
- ☐ **CMS View Only User**
View patient profiles, view assessments, generate and view reports.
- ☐ **CMS General User**
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.
- ☐ **IQIES Help Desk**
IQIES system support.
- ☐ **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
- ☐ **CLIA 116 CMS Admin**
Admin Access to CLIA Demographics and Lab Intake
- ☐ **CLIA Assistant User**
Access to use the CLIA Assistant
- ☒ **CLIA Assistant Admin**
Admin access to use CLIA Assistant and manage CLIA Assistant documents and feedback
- ☐ **CLIA 116 CMS Full Access**
CMS users who author and review CLIA 116 applications nationally and may change a lab classification.
- ☐ **CLIA Proficiency Testing Admin**
CMS users who maintain CLIA proficiency testing programs and analytes, upload and cancel result files, and export proficiency testing data.

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

Figure 47: Select a User Role

10.4 Select **CLIA Assistant Admin**.

- 10.5 Click **Next**. The **Add Organizations** window opens. See *Figure 48, Add Organizations*.



STEP 3

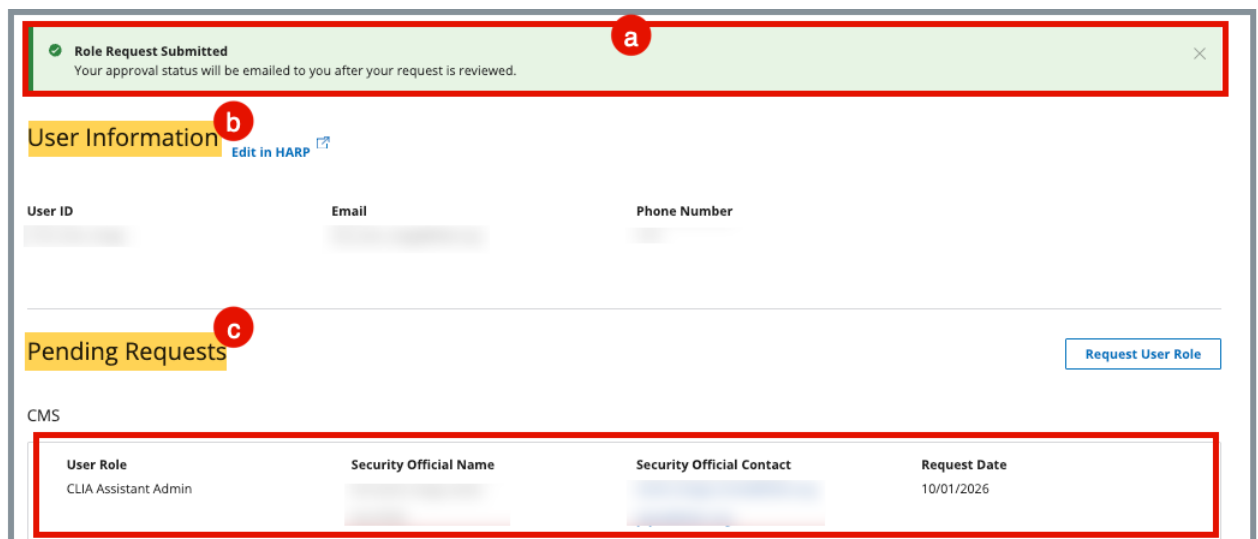
Add Organizations

This role does not require the addition of organizations.

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

Figure 48: Add Organizations

- 10.6 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 49, 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: [Redacted] Email: [Redacted] Phone Number: [Redacted]

Pending Requests

[Request User Role](#)

CMS

User Role	Security Official Name	Security Official Contact	Request Date
CLIA Assistant Admin	[Redacted]	[Redacted]	10/01/2026

Figure 49: 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.

11. CLIA 116 CMS Full Access

- 11.1 Log in to the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. Refer to [Create an Account in HARP](#) for further information, if necessary. The Welcome to iQIES page opens. See *Figure 50, Welcome to iQIES*.

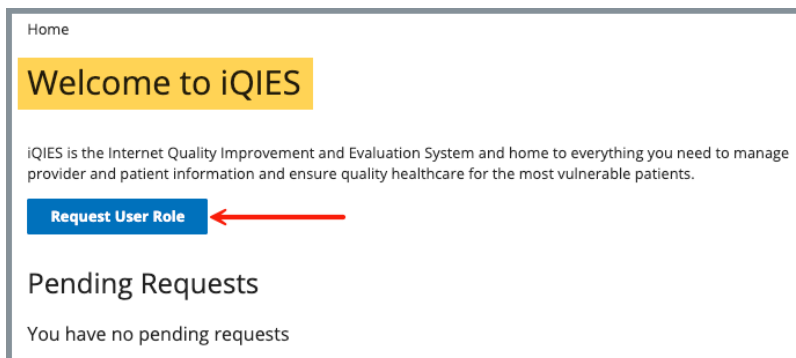


Figure 50: Welcome to iQIES

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.

- 11.2 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 51, 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 51: Select a User Category

- 11.3 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 52, Select a User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

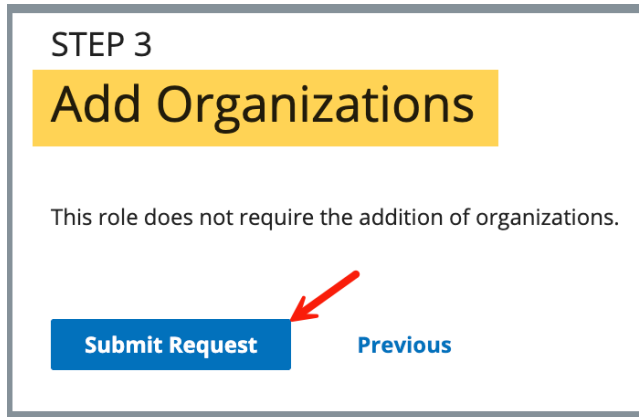
- ☐ **CMS View Only User**
View patient profiles, view assessments, generate and view reports.
- ☐ **CMS General User**
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.
- ☐ **iQIES Help Desk**
iQIES system support.
- ☐ **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
- ☐ **CLIA 116 CMS Admin**
Admin Access to CLIA Demographics and Lab Intake
- ☐ **CLIA Assistant User**
Access to use the CLIA Assistant
- ☐ **CLIA Assistant Admin**
Admin access to use CLIA Assistant and manage CLIA Assistant documents and feedback.
- ☒ **CLIA 116 CMS Full Access**
CMS users who author and review CLIA 116 applications nationally and may change a lab classification.
- ☐ **CLIA Proficiency Testing Admin**
CMS users who maintain CLIA proficiency testing programs and analytes, upload and cancel result files, and export proficiency testing data.

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

Figure 52: Select a User Role

11.4 Select CLIA 116 CMS Full Access.

- 11.5 Click **Next**. The **Add Organizations** window opens. See *Figure 53, Add Organizations*.



STEP 3

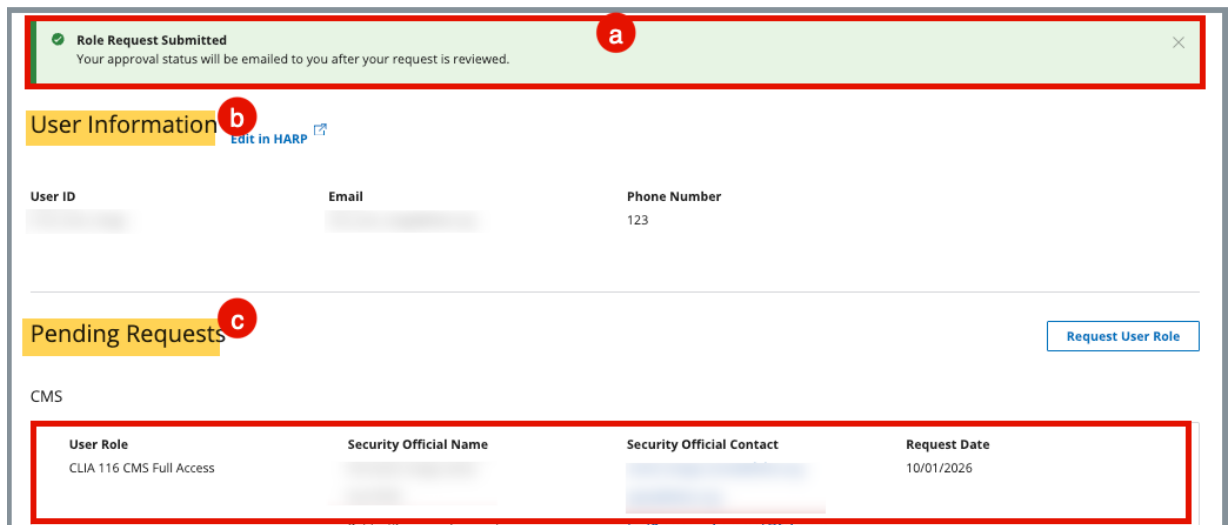
Add Organizations

This role does not require the addition of organizations.

Submit Request Previous

Figure 53: Add Organizations

- 11.6 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 54, 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: [Redacted] Email: [Redacted] Phone Number: 123

Pending Requests

Request User Role

User Role	Security Official Name	Security Official Contact	Request Date
CLIA 116 CMS Full Access	[Redacted]	[Redacted]	10/01/2026

Figure 54: 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.

12. CLIA Proficiency Testing Admin

- 12.1 Log in to the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. Refer to [Create an Account in HARP](#) for further information, if necessary. The Welcome to iQIES page opens. See *Figure 55, Welcome to iQIES*.

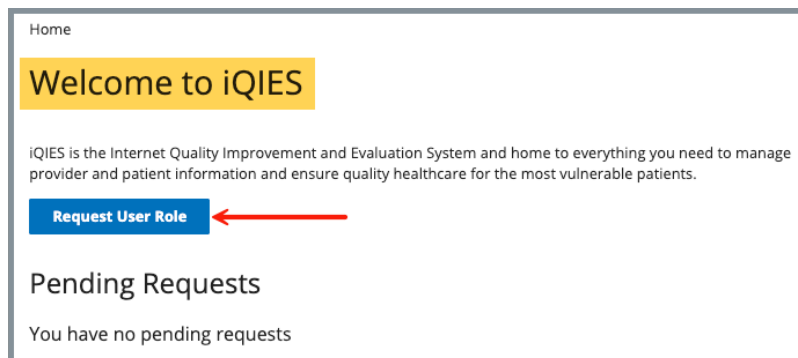


Figure 55: Welcome to iQIES

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.

- 12.2 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 56, 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 56: Select a User Category

- 12.3 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 57, Select a User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

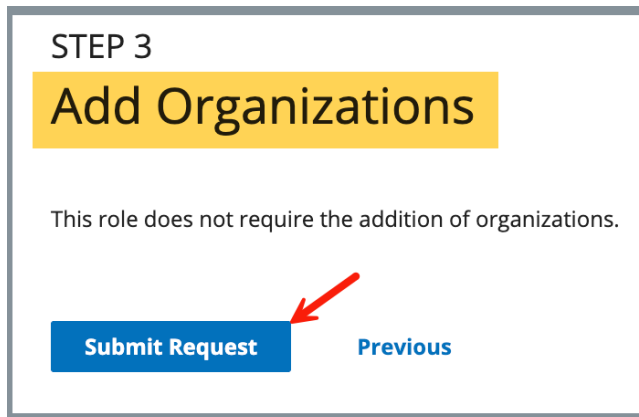
- ☐ **CMS View Only User**
View patient profiles, view assessments, generate and view reports.
- ☐ **CMS General User**
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.
- ☐ **iQIES Help Desk**
iQIES system support.
- ☐ **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
- ☐ **CLIA 116 CMS Admin**
Admin Access to CLIA Demographics and Lab Intake
- ☐ **CLIA Assistant User**
Access to use the CLIA Assistant
- ☐ **CLIA Assistant Admin**
Admin access to use CLIA Assistant and manage CLIA Assistant documents and feedback
- ☐ **CLIA 116 CMS Full Access**
CMS users who author and review CLIA 116 applications nationally and may change a lab classification.
- ☒ **CLIA Proficiency Testing Admin**
CMS users who maintain CLIA proficiency testing programs and analytes, upload and cancel result files, and export proficiency testing data.

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Figure 57: Select a User Role

12.4 Select CLIA Proficiency Testing Admin.

- 12.5 Click **Next**. The **Add Organizations** window opens. See *Figure 58, Add Organizations*.



STEP 3

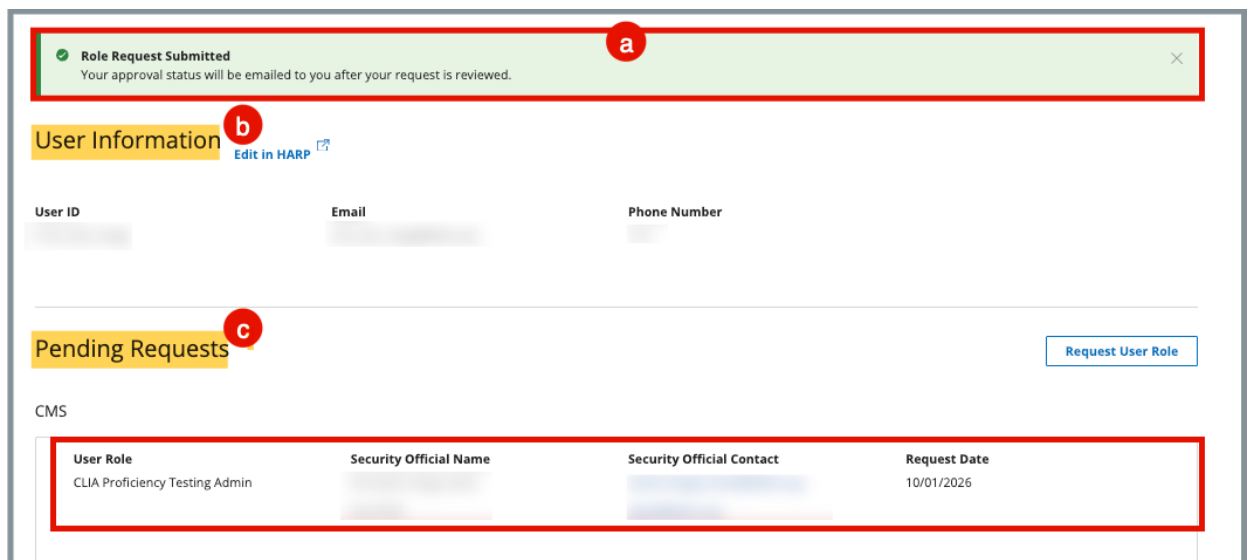
Add Organizations

This role does not require the addition of organizations.

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

Figure 58: Add Organizations

- 12.6 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 59, 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](#)

CMS

User Role	Security Official Name	Security Official Contact	Request Date
CLIA Proficiency Testing Admin			10/01/2026

Figure 59: 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.

13. CLIA 116 State Data Liaison

- 13.1 Log in to the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. Refer to [Create an Account in HARP](#) for further information, if necessary. The Welcome to iQIES page opens. See *Figure 60, Welcome to iQIES*.

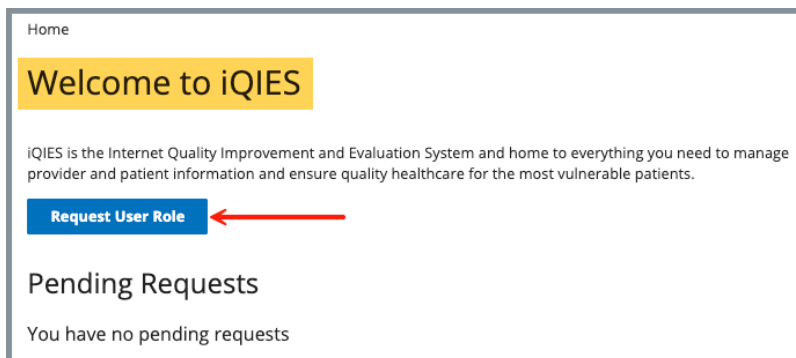


Figure 60: Welcome to iQIES

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.

- 13.2 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 61, 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 61: Select a User Category

13.3 Select **State Agency**. Click **Next**. The **Select a User Role** page opens. See *Figure 62, 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
- ☐ **State Agency iQAN NH User**
Allow state agency users access to the iQAN email notification system for Nursing Home within iQIES
- ☐ **State Agency iQAN ACC User**
Allow state agency users access to the iQAN email notification system for all acute & continuing care provider types within iQIES
- ☒ **CLIA 116 State Data Liaison**
State agency users who create and submit CLIA 116 applications for labs in their state.
- ☐ **CLIA 116 State Approver**
State agency users who review CLIA 116 applications for labs in their state, publishing, rejecting, returning to draft or archiving them.
- ☐ **Bulk Intake API Access**
Access to all State users to create bulk intakes by submitting a json file through a direct API access

Next

Previous

Figure 62: Select a User Role

13.4 Select **CLIA 116 State Data Liaison**.

13.5 Click **Next**. The **Add Organizations** window opens. See *Figure 63, 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 63: Add Organizations

- 13.6 Select state from drop-down menu under **State**.
- 13.7 Type **State Agency Employee ID**, if available.
- 13.8 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 64, Request Submitted Notification*.

Role Request Submitted (a)

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

User Information (b)

[Edit in HARP](#)

User ID: [Redacted] Email: [Redacted] Phone Number: [Redacted]

Pending Requests (c)

[Request User Role](#)

User Role	Security Official Name	Security Official Contact	Request Date
CLIA 116 State Data Liaison	[Redacted]	[Redacted]	10/01/2026

Figure 64: 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.

14. CLIA 116 State Approver

- 14.1 Log in to the iQIES training environment with HARP credentials at <https://training-iqies.cms.gov/> or to production <https://iqies.cms.gov>. Refer to [Create an Account in HARP](#) for further information, if necessary. The Welcome to iQIES page opens. See *Figure 65, Welcome to iQIES*.

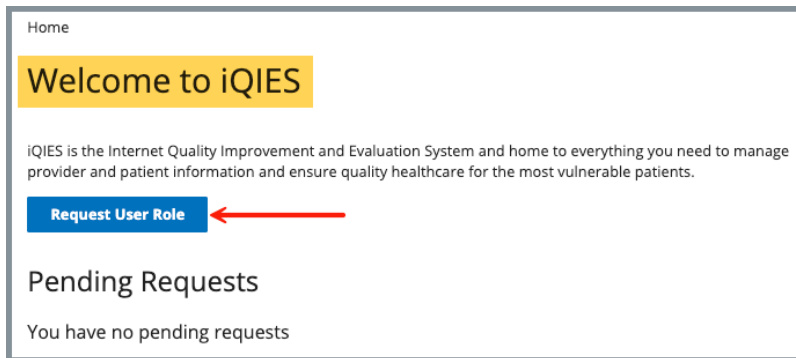


Figure 65: Welcome to iQIES

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.

- 14.2 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 66, 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 66: Select a User Category

- 14.3 Select **State Agency**. Click **Next**. The **Select a User Role** page opens. See *Figure 67, 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
- ☐ **State Agency iQAN NH User**
Allow state agency users access to the iQAN email notification system for Nursing Home within iQIES
- ☐ **State Agency iQAN ACC User**
Allow state agency users access to the iQAN email notification system for all acute & continuing care provider types within iQIES
- ☐ **CLIA 116 State Data Liaison**
State agency users who create and submit CLIA 116 applications for labs in their state.
- ☒ **CLIA 116 State Approver**
State agency users who review CLIA 116 applications for labs in their state, publishing, rejecting, returning to draft or archiving them.
- ☐ **Bulk Intake API Access**
Access to all State users to create bulk intakes by submitting a json file through a direct API access

Next [Previous](#)

Figure 67: Select a User Role

14.4 Select **CLIA 116 State Approver**.

14.5 Click **Next**. The **Add Organizations** window opens. See *Figure 68, 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 68: Add Organizations

- 14.6 Select state from drop-down menu under **State**.
- 14.7 Type **State Agency Employee ID**, if available.
- 14.8 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 69, 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	Security Official Name	Security Official Contact	Request Date
CLIA 116 State Approver			10/01/2026

Figure 69: 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.