



iQIES Onboarding Process

Job Aid

Provider User Roles

Overview

This onboarding job aid explains how providers access iQIES and request a provider user role.

Review the [Reference & Manuals](#) on QTSO (QIES Technical Support Office) for detailed information on how to use iQIES. There are also separate onboarding guides for Security Officials and State Agency Assessment Coordinators..

Roles and Permissions

iQIES roles allow users to access information pertinent to their area of work.

Permissions are ultimately governed by HARP (Health Care Quality Information Systems (HCQIS) Access Roles and Profile) access privileges. Contact the SO for your organization or the iQIES Service Center for issues relating to access and permissions. Review the [iQIES User Roles Matrix](#) for detailed information on specific provider user roles.

The following roles are available for providers:

- **Assessment Submitter**
- **Provider Assessment Viewer**
- **Provider Administrator**
- **Provider Assessment Coordinator**
- **Provider ePOC Administrator**
- **Provider Security Official**
- **PBJ Submitter**
- **PBJ Viewer**

For additional help, see [iQIES Service Center information](#) below or click the help icon in the top right corner of the screen, see *Figure 1, Help Icon*, for further information.



Figure 1: Help Icon

1. Log in to iQIES

1.1 Go to <https://iqies.cms.gov/>.

1.2 Type HARP User ID and password. See *Figure 2, iQIES Log In Page*.

Note: Go to [HARP Help Page](#) for detailed instructions on how to log in to HARP or review the [HARP video](#).

The screenshot shows the iQIES login page. On the left, there is a welcome message: "Welcome to iQIES" followed by "Essential accessibility and connectivity for health care professionals." On the right, there is a "Log In" section with a yellow header. Below the header, it says "All required fields are marked with an asterisk (*)". There are two input fields: "User ID" and "Password". Below these is a checkbox with the text "I have read the full privacy and security notice below and consent to its terms and conditions regarding usage and information collection." At the bottom of the login section is a blue "Log In" button and a link "Forgot your user ID or password?". At the very bottom of the page, there is a privacy notice paragraph. In the top right corner of the page, there is a red circle with the number "5" and a question mark icon.

Figure 2: iQIES Log In Page

Table 1: iQIES Log In Page Callout Details

Callout	Detailed Explanation
1	Type HARP user ID.
2	Type HARP password.
3	Check privacy and security notice. Notice details are at the bottom of the page.
4	Click Log In to log in to iQIES.
5	Click the question mark (?) to get to the iQIES Help page, which has detailed help information.

- 1.3 Click privacy and security check box.
- 1.4 Click **Log In**. The **Two-Factor Authentication** window opens. See *Figure 3, Two-Factor Authentication*.

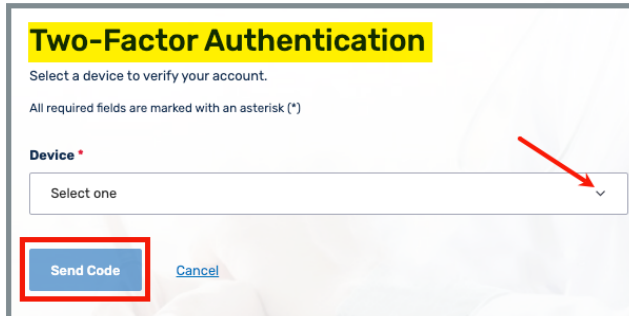


Figure 3: Two-Factor Authentication

- 1.5 Click the caret under **Device** to select the device from the drop-down menu.
Note: Two-factor authentication is set up in HARP. Go to [HARP FAQs](#) to learn how to update, if desired, the device to verify account.
- 1.6 Click **Send Code**. The code is sent to the requested device. The **Enter Code** window opens. See *Figure 4, Enter Code Window*.

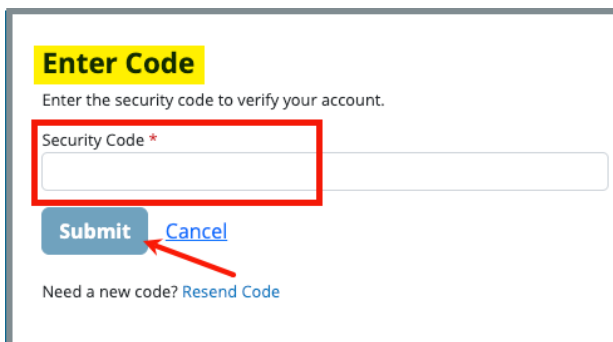


Figure 4: Enter Code Window

- 1.7 Type the code received in the field under **Security Code**.
Note: **Submit** is disabled until correct security code is typed.
- 1.8 Click **Submit**. The **Welcome to iQIES/Request User Role** page opens.
Note: The **Welcome to iQIES/Request User Role** page only opens the first time iQIES is opened. Once a role has been approved, iQIES opens to either the user role dashboard, or the appropriate role landing page.

2. Request a User Role in iQIES

Note: The Provider SO user role job aid can be found on [QTSO](#).

- 2.1 Click **Request User Role**. See *Figure 5, Request a User Role*. The **Select a User Category** page opens.

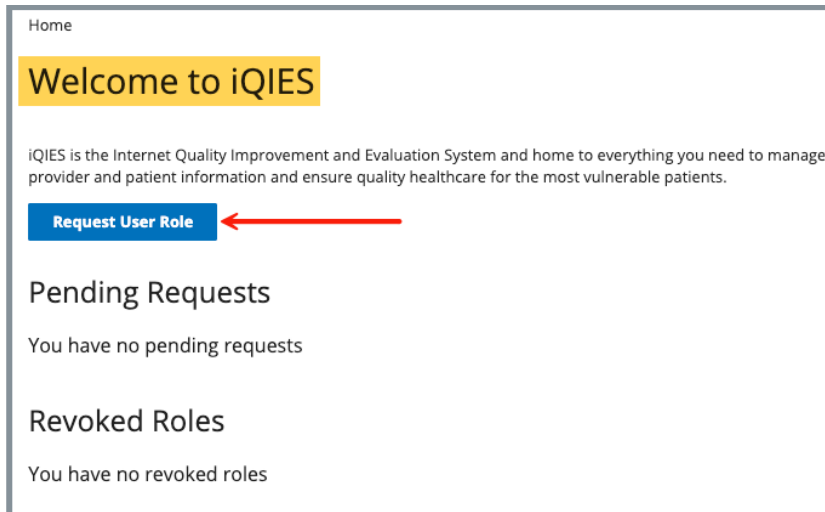


Figure 5: Request a User Role

Note: The **Welcome to iQIES** page does not open when there is an existing user role. To request a user role when there is an existing user role, follow the steps below. See *Figure 6, Request User Role From Top Menu*.

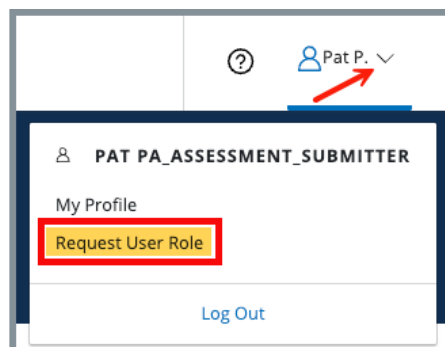


Figure 6: Request User Role From Top Menu

- a. Click the user icon in the top right corner of iQIES. A drop-down menu opens.
- b. Click **Request User Role**. The **Select a User Category** page opens. Follow the next steps.

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.

Figure 7: Select a User Category

- 2.2 Select **Provider**. See *Figure 7, Select a User Category*.
- 2.3 Click **Next**. The **Select a User Role** page opens. See *Figure 8, Select a User Role*.

Note: **Next** is disabled until a selection is made.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- Assessment Submitter**
Upload patient assessments; generate and view reports.
- Provider Administrator**
Create and manage patient profiles; create, manage, submit, modify, and inactivate patient assessments; generate and view reports. (Warning: Cannot upload patient assessments)
- Provider Assessment Coordinator**
Create and manage patient profiles and assessments within iQIES; create, manage, and submit patient assessments; generate and view reports
- Provider Assessment Viewer**
View patient profiles and their assessments; generate and view reports. (Warning: Cannot upload patient assessments)
- Provider Security Official**
Approve iQIES user accounts; upload, create, manage, submit, modify, and inactivate patient assessments; create and manage patient profiles; generate and view reports.
- Provider ePOC Administrator**
View posted Statement of Deficiencies and provide the Plan of Correction as well as Completion dates for citations posted to the provider.
- PBJ Submitter**
Upload, edit and view PBJ submissions; generate and view reports.
- PBJ Viewer**
View PBJ submissions; generate and view reports.


Figure 8: Select a User Role

- 2.4 Select a provider user role.
- 2.5 Click **Next**. The **Add Organizations** window opens. See *Figure 9, Add Organizations*.

Note: **Next** is disabled until a user role is selected.

STEP 3
Add Organizations

Add providers for the Provider Admin role by entering their CCN or Facility ID.

Search By
 

Select whether to search by CCN or Facility ID

Search for

Add


Provider	Provider Type	CCN	Facility ID
<p>Submit Request Previous</p>			

Figure 9: Add Organizations


- 2.6 Select whether to search by **CCN** or by **Facility ID** from the drop-down menu under **Search By**.
- 2.7 Type search criteria in field under **Search for**. See Figure 10, *Provider Information*.

STEP 3
Add Organizations

Add providers for the Assessment Submitter role by entering their CCN or Facility ID.

Search By
 

Select whether to search by CCN or Facility ID

Search for
 

Add

1 Provider

Provider	Provider Type	CCN	Facility ID
DAVIS COUNTY HOSPITAL 509 NORTH MADISON STREET BLOOMFIELD, IA 52537	NH	16E724	IA1077

Remove


Submit Request  [Previous](#)

Figure 10: Provider Information

2.8 Click **Add**. The provider details appear below.

Notes:

- At least one provider must be selected
- More than one provider can be added
- Click **Remove** to remove a provider

2.9 Click **Submit Request**. The **My Profile** page opens.

2.10 Verify the **Role Request Submitted** green notification bar appears on the top of the page. See *Figure 11, Role Request Submitted Notification*.

The screenshot shows the iQIES user interface. At the top, there is a yellow banner that says "Welcome to iQIES". Below this is a green notification bar with a checkmark icon and the text "Role Request Submitted" and "Your approval status will be emailed to you after your request is reviewed." Below the notification is a blue button labeled "Request User Role". Underneath is another yellow banner labeled "Pending Requests". Below that, it says "Provider" and "1 Provider". A table is displayed with the following columns: User Role, Provider, Provider Type, CCN, Assessment FAC ID, Request Date, Security Official Name, and Security Official Contact. The table contains one row with the following data: Assessment Submitter, [blurred], NH, [blurred], [blurred], 03/31/2026, [blurred], [blurred].

User Role	Provider	Provider Type	CCN	Assessment FAC ID	Request Date	Security Official Name	Security Official Contact
Assessment Submitter	[blurred]	NH	[blurred]	[blurred]	03/31/2026	[blurred]	[blurred]

Figure 11: Role Request Submitted Notification

Notes:

- The pending request appears under **Pending Requests** at the bottom of the screen.
- The role must be approved by the SO. Approval can take up to several days. For more information on user roles, refer to the [iQIES User Roles Matrix](#).

iQIES Service Center

The iQIES Service Center supports users working within the various iQIES components: S&C, Patient Assessment, and Reporting.

Assistance Accessing iQIES: Contact the iQIES SO for your organization

Technical Support: Contact the iQIES Service Center:

Phone: 888-477-7876 (select Option 1)

Email: iQIES@cms.hhs.gov

CCSQ Support Central: Create a new ticket or track an existing ticket:
https://cmsqualitysupport.servicenowservices.com/ccsq_support_central

Idea Portal: Submit, comment, vote, and follow ideas on how to improve or enhance iQIES. Go to [CCSQ Support Central](#) and click on **Idea Portals** to log in to the Idea Portal. Review the [iQIES Idea Portal Manual](#) for further information.

More information on iQIES: Refer to [QTSO](#) and the [Quality, Safety, & Education Portal](#) (QSEP). HARP login may be required before accessing some documentation in QTSO and QSEP.

iQIES reference materials include:

- Links to Training Videos for providers
- Assessment Management User Manual
- Quick Reference Guides
- Manage User Information
- Other helpful iQIES material

iQIES training materials on QSEP include S&C Foundation Series Videos