



iQIES Survey & Certification

Job Aid

State Agency General User (SAGU) New User Onboarding

Overview

This new user onboarding job aid addresses how to request a SAGU role in iQIES.

For detailed information on how to use iQIES, refer to [Reference & Manuals](#) on QTSO (QIES Technical Support Office).

There are separate onboarding guides for Security Officials and State Agency Assessment Coordinators. Refer to [Reference & Manuals](#) on QTSO.

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. Refer to the [iQIES User Roles Matrix](#) for detailed information on specific State Agency user roles.

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 into HARP or review the [HARP video](#).

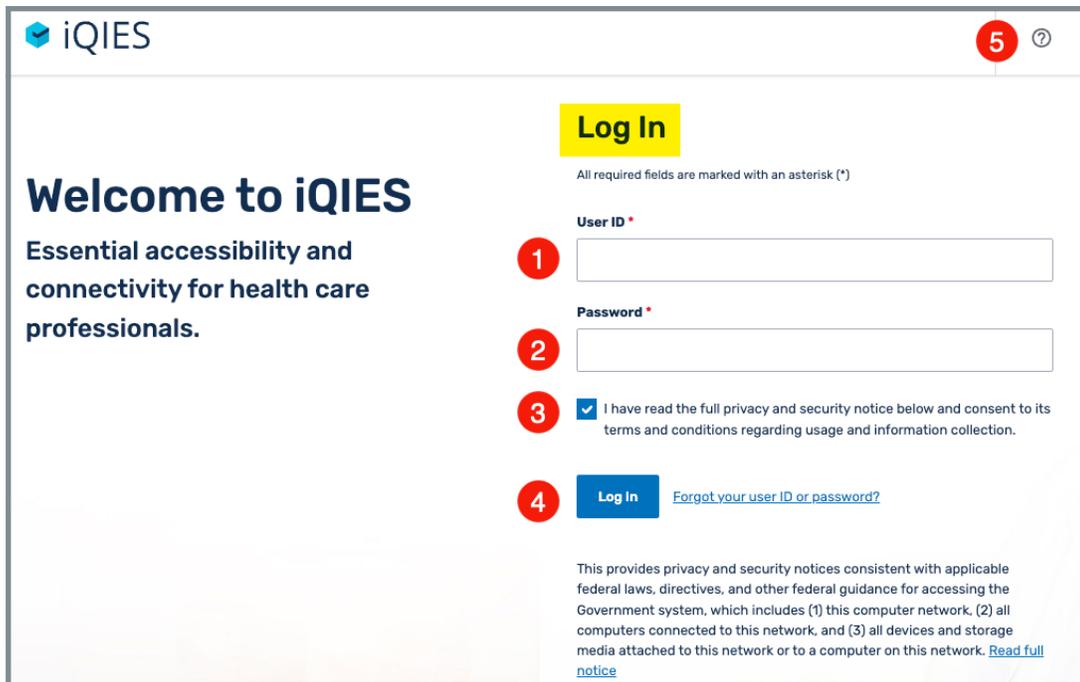


Figure 2: iQIES Log In Page

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 into 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*.

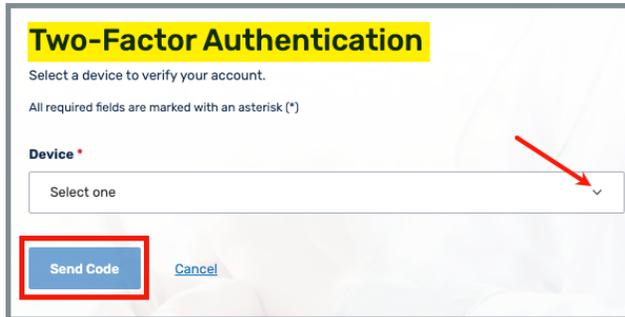


Figure 3: Two-Factor Authentication

- 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*.

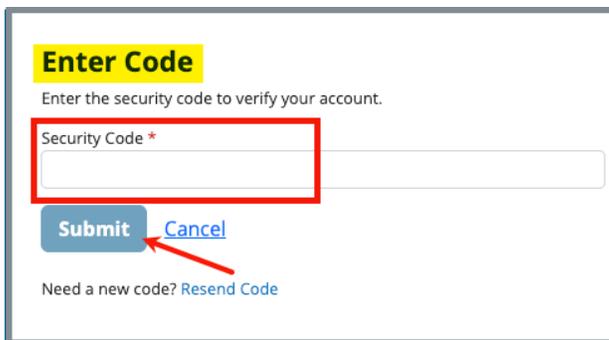


Figure 4: Enter Code Window

- 1.7 Type the code received in the field under **Security Code**.
Note: **Submit** is greyed out 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

Notes:

- All users start with the **State Agency S&C General User** role, which has read-only access. Once the basic role has been approved by the Security Official (SO), it is possible to add additional roles.
- SO user role job aids 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.

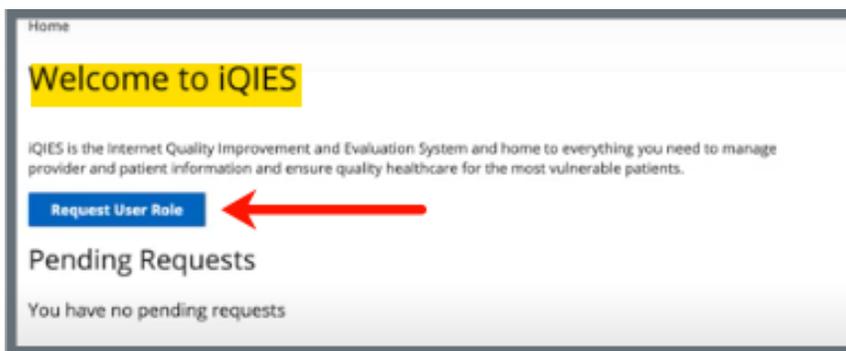


Figure 5: Request a User Role

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 bulleted steps below. See *Figure 6, Request User Role From Top Menu*.

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

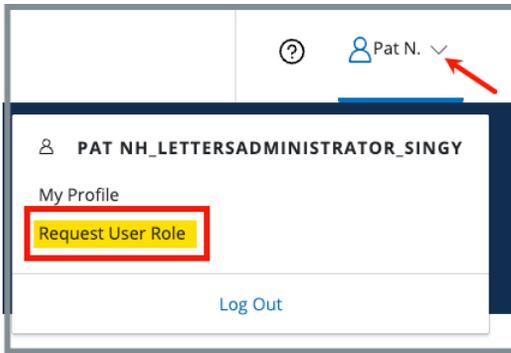


Figure 6: Request User Role From Top Menu

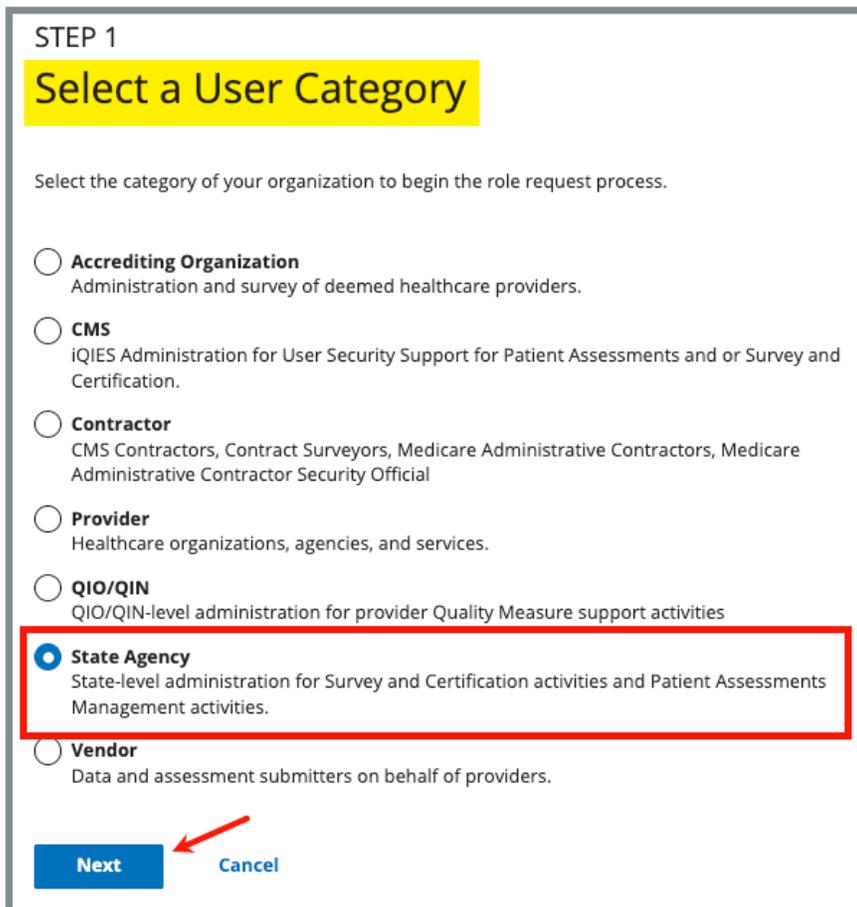


Figure 7: Select a User Category

- 2.2 Select **State Agency**. 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*.

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

Next ← Previous

Figure 8: Select a User Role

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

Note: **Next** is greyed out until a user role is selected.

STEP 3

Add Organizations

Enter the state for your organization.

State *
Florida

State Agency Employee ID

Forgot your ID? [?](#)

Are you a Surveyor?
 Yes
 No

Submit Request Previous

Figure 9: Add Organizations

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

Notes:

- A separate request is needed when a State Agency has more than one state.
- **State Agency Employee ID** and **Are you a Surveyor** are optional responses. A response in those fields opens further fields.

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

Note: **Submit Request** is greyed out until a state is selected.

2.8 Verify the **Role Request Submitted** green notification bar appears on the top of the page. See *Figure 10, Role Request Submitted Notification*.

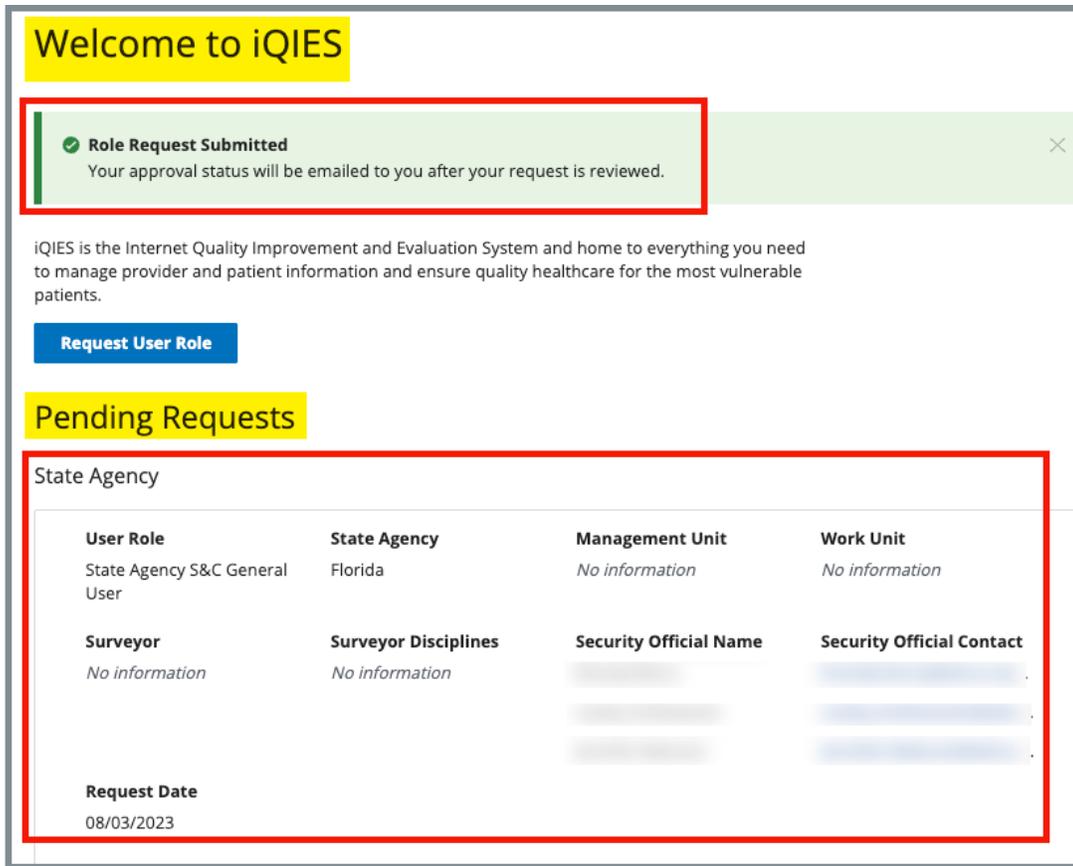


Figure 10: Role Request Submitted Notification

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 into the Idea Portal. Refer to the [iQIES Idea Portal Manual](#) for further information.

More information on iQIES: Refer to [QTSO](#) and the [Quality, Safety, & Education Portal](#) (QSEP). Logging in to HARP 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