



iQIES Onboarding Process Quick Reference Guide

Provider Security Official (PSO) Role

Overview

This document provides the steps involved to onboard the Provider Security Official (PSO) Role in iQIES.

- For detailed information on onboarding, refer to [iQIES Onboarding Guide](#).
- For detailed information about user roles, refer to **User Roles Matrix** on the [iQIES Help page](#).
- A red asterisk (*) indicates a required field in iQIES.

What does a PSO do?

The PSO is responsible for granting user roles in iQIES. Without those user roles, the general user cannot upload assessments or generate and view reports for their facility.

PSO User Information

- CMS recommends that every facility has at least two designated PSOs.
- The first PSO for the facility can only be approved by CMS.
- An existing PSO can approve additional PSO roles for their provider.
- A user must have PSO approval to access iQIES.
- The PSO receives email notifications when there are pending iQIES user role requests.

What if the only PSO has left the facility?

- No new user roles can be approved until a new PSO is approved.
- Contact the iQIES Service Center at 800-339-9313 or iQIES@cms.hhs.gov and request the removal of the previous PSO prior to requesting the new PSO role.

iQIES Onboarding Process Steps

1. Create an account in HARP. Choose one of the following options:

- Go to <https://harp.cms.gov/register>.¹
- Enter profile information. Click **Next**.
- Choose **User ID**, **Password**, and **Challenge Question** and **Answer**. Click **Next**.
- Answer Identity Proofing Questions. Click **I am not a robot** checkbox. Click **Next**. An email is automatically generated confirming account creation.
- Click **Login to Complete Setup** to log into HARP and set up two-factor authentication.
- Select **Device Type** from drop-down menu.
- Enter **Phone Number**. Click **Send Code**. A code is sent to the device.
- Type **Security Code**. Click **Submit**.

2. Create a Provider Security Official role in iQIES

- Go to <https://iqies.cms.gov/>. Log in with HARP credentials. The **Welcome to iQIES** page opens.
- Click **Request User Role**. The **Select a User Category** page opens.
- Select **Provider**. Click **Next**. The **Select a User Role** page opens.
- Select **Provider Security Official**. Click **Next**. The **Add Organizations** window opens.
- Select **CCN** or **Facility ID** from the **Search By** drop-down menu.
- Type the **CCN** or **Facility ID** in the **Search for** field. Click **Add**. To add additional providers, repeat this step as often as necessary.
- Click **Submit Request**. The **Welcome to iQIES** home page opens. The **Role Request Submitted** green banner shows on the top of the page. View the user roles requested under **Pending Requests**.

Do you already have an iQIES ID?

- Log in to iQIES.
- Go to the top right corner and click the caret next to the username.
- Select **Request User Role**. The **Select a User Category** page opens.
- Continue with the third bullet.

3. Await Approval

The designated PSO approves each iQIES user role and an email is automatically generated once the role is approved. Approvals may take up to several days. Reach out to the PSO when there is an existing one, or CMS for a status update, if necessary.

¹ A training video is available at <https://www.youtube.com/watch?v=G1zj8JqxWg4>