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](mailto: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
   - Click Request User Role. The Select a User Category page opens.
   - Select Provider. Click Next. The Select a User Role page 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.

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